

# LAND SUPPLY & DEMAND

sixth **GROWTH POLICY** report

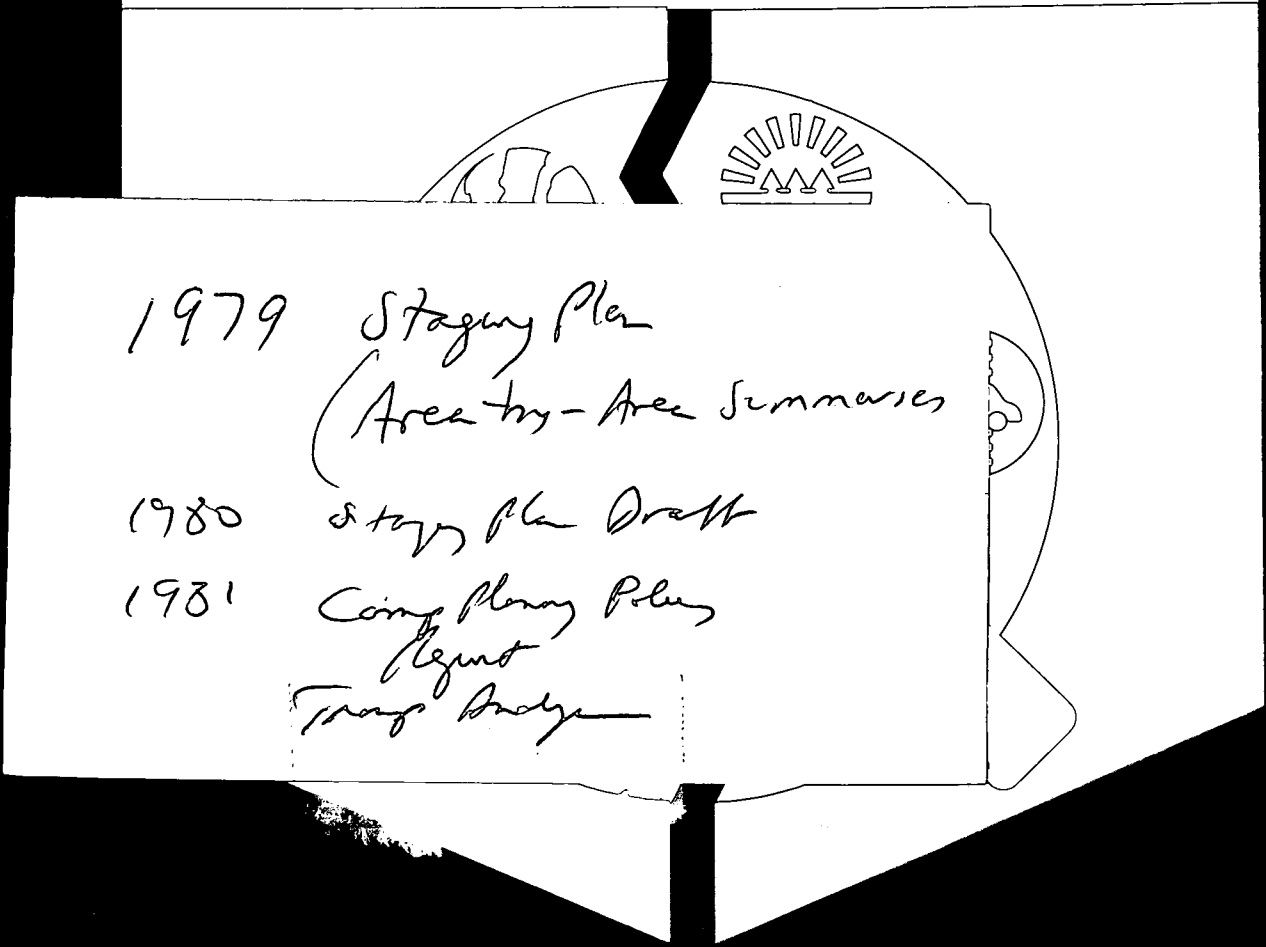
of the  
MONTGOMERY COUNTY  
PLANNING BOARD

November 1980

Bob,

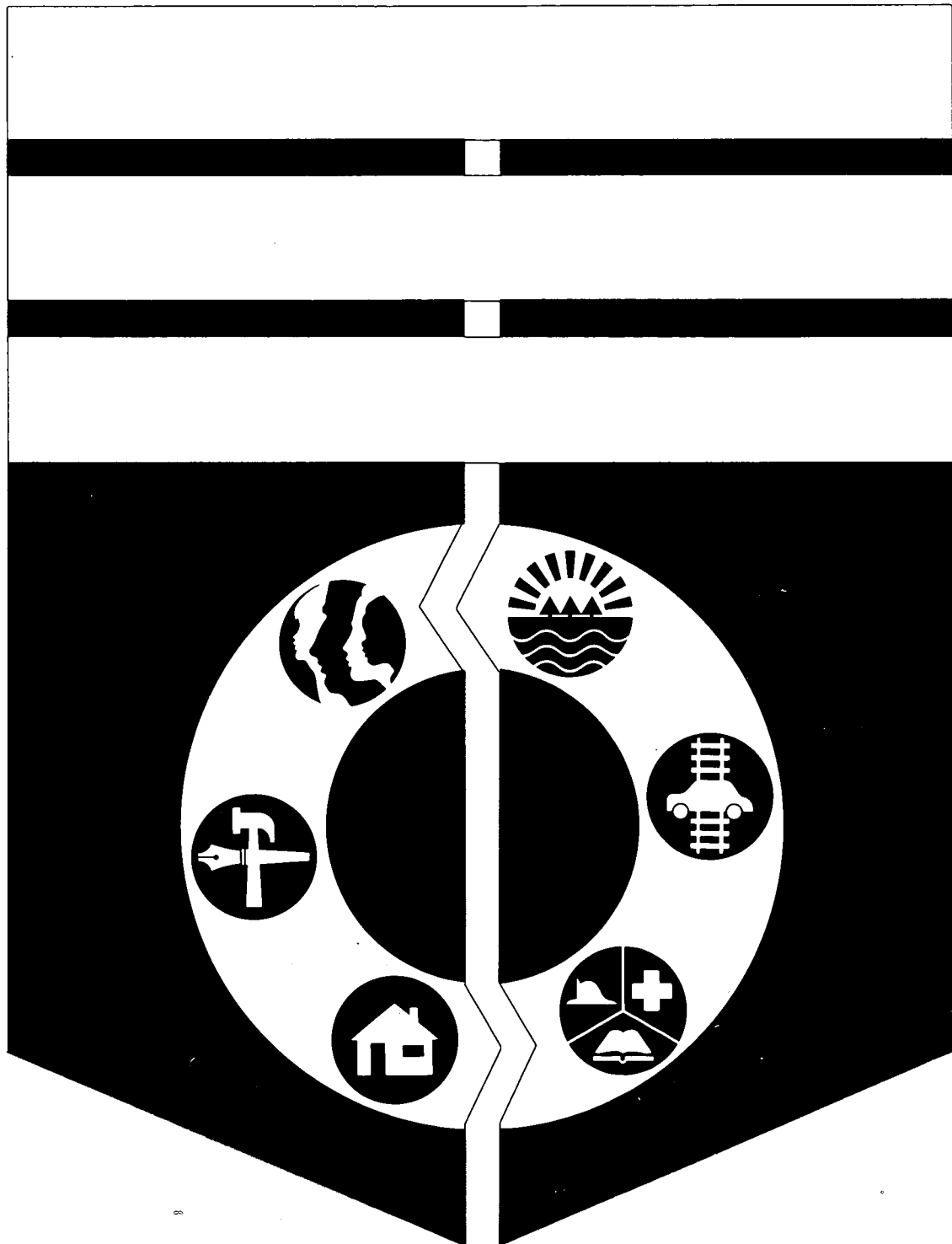
Thank you!

Sally

- 
- 1979 Staging Plan  
(Area by - Area Summaries)
- 1980 Staging Plan Draft
- 1981 Coming Planning Policy  
Report  
Travis Brady



# LAND SUPPLY



LAND SUPPLY

SIXTH  
GROWTH  
POLICY  
REPORT

of the

MONTGOMERY COUNTY  
PLANNING BOARD

NOVEMBER 1980

THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION



## THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

The Maryland-National Capital Park and Planning Commission is a bi-county agency created by the General Assembly of Maryland in 1927. The Commission's geographic authority extends to the great majority of Montgomery and Prince George's Counties: the Maryland-Washington Regional District (M-NCPPC planning jurisdiction) comprises 1,001 square miles, while the Metropolitan District (parks) comprises 919 square miles, in the two counties.

The Commission has three major functions:

- (1) the preparation, adoption, and from time to time amendment or extension of the General Plan for the physical development of the Maryland-Washington Regional District;
- (2) the acquisition, development, operation, and maintenance of a public park system; and
- (3) in Prince George's County only, the operation of the entire County public recreation program.

The Commission operates in each county through a Planning Board appointed by and responsible to the County Government. All local plans, recommendations on zoning amendments, administration of subdivision regulations, and general administration of parks are responsibilities of the Planning Boards.

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**TITLE:** LAND SUPPLY AND DEMAND, Sixth Growth Policy Report of the Montgomery County Planning Board

**AUTHOR:** The Montgomery County Planning Board of The Maryland-National Capital Park and Planning Commission

**SUBJECT:** A detailed inventory of supply of residential land which is available for development and an illustrative scenario of the County's population and housing growth for the 1980's.

**DATE:** November 1980

**PLANNING AGENCY:** The Montgomery County Planning Board of The Maryland-National Capital Park and Planning Commission

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**ABSTRACT:** This document includes two reports. The Supply report presents a detailed inventory of Montgomery County's residential land which is available for development. The Demand report is designed to foster a discussion of illustrative scenarios for Montgomery County's population and housing growth for the 1980's given changes in trends indicated by recent census data and a slower-paced economic outlook.

## INTRODUCTION

This is the sixth in a series of growth policy reports. These reports are intended to help focus an evolving perspective of the growth management process in the County, and to assist in the guidance and coordination of the many ongoing activities that together constitute that process over the year. While previous reports contained action recommendations relevant to the situation at the time, they also explored a developing sequence of tools and ideas.

The first report, called Framework for Action, in addition to describing issues of the day and a general policy approach to them, laid out a preliminary concept model of the comprehensive growth management process. One of the key ideas in this model was the necessity to distinguish between the public and the private sectors, and to recognize the fiscal and constitutional limitations on local government capabilities.

The second report, called Fiscal Impact Analysis, and its Sequel--Environment and Transportation, produced recommendations derived from testing the fiscal implications of alternative future rates of growth. It also developed a computerized fiscal analysis model, and outlined the importance of the "level of service" idea to the concept of fiscal management.

The third report, called Forecast--People, Jobs and Housing, was a technical report that documented the Planning Board's then-current population forecasts. One of the key ideas that subsequently developed out of this experience was the "investment risk analysis" concept.

The fourth report, called Carrying Capacity and Adequate Public Facilities, recommended improvements to the County's Adequate Public Facilities Ordinance. One of the key ideas outlined was the "carrying capacity concept," which involved the selection and analysis of critical elements within the public service systems, through implementation of another idea, called the "adequate public facilities" concept.

The fifth report, called Planning, Staging and Regulating, carried out the recommendations of the fourth report. One of the key ideas developed is the concept of "staging," as providing the necessary and desirable link between the concepts of "planning" and "regulating," on the private sector side of growth management, and between "planning" and "budgeting," on the public sector side.

This sixth report, called Land Supply and Demand, actually is two reports in one. The Supply report presents a detailed inventory of Montgomery County's residential land which is available for development. Existing zoning is used for the analysis, with the exception of anticipated sectional map amendments which are in the process of being completed for the Potomac Subregion, Olney, and the Functional Master Plan for the Preservation of Agriculture and Open Space. The Demand report is designed to foster a discussion of illustrative scenarios for Montgomery County's population and housing growth for the 1980's given changes in trends indicated by recent census data and a slower paced national economic outlook. Since a new round of Cooperative Forecasting is beginning and the School Board has a need for alternative forecast scenarios for their Long Range Facilities Plan, we believe that the timing for this Demand report is appropriate. The "folder" technique is used to release the two reports since it is expected that public discussion will lead to additional requests for supply data and scenario alternatives. In addition, since we have estimated the results of certain sectional map amendments, at some time it will be necessary to produce revisions to the land supply tables.

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## SUMMARY OF FINDINGS

- Based upon existing zoning, the total dwelling unit potential of vacant and redevelopable residential land in Montgomery County is 174,000 units.
- The sum of the redevelopment capacity for the County's Transit Station and CBD areas is 15,600 units. When the trends toward higher interest rates and high construction costs are combined with redevelopment costs, it appears likely that only a small amount of this capacity will be used during the decade.
- The dwelling unit potential of vacant land within sewerage service categories 1-3 totals 94,000 units.
- Small lot zoning (R-90, R-60, R-40, and RT densities) potential makes up 33 percent of the total dwelling unit supply in sewerage service categories 1-3. The share for garden apartments is 29 percent.
- Thirty percent of the small lot and garden apartment supply is in the non-euclidian "planned community" zones which include TS (Town Sector), PD (Planned Development), PRC (Planned Retirement Community, and PN (Planned Neighborhood).
- Fifty-three (53) percent of existing housing is in small lot zoning compared to 33 percent of the vacant land supply.
- When the capacity in the planned community zones is excluded, the majority of garden apartment and small lot capacity is located on parcels of less than 10 acres.
- Current trends indicate a development shift to small lot relative to large and medium lot zoning. If economic and energy conditions persist, much of the lower density supply will essentially be unavailable for development. This would effectively reduce the capacity within sewerage service categories 1 - 3 by one-third.
- The I-270 Corridor contains over 50 percent of Montgomery County's vacant residential zoning supply, with Germantown alone accounting for 27 percent of the County's total.
- Based upon its share of small lot (62 percent) and garden apartment (70 percent) zoning, it is expected that the I-270 Corridor will, for many years in the future, be the principal location of middle and moderate cost housing in Montgomery County.
- Outside of the I-270 Corridor area, the only major concentration of garden apartment zoning is within the Fairland Policy Area.

## SECTION 1

### General Characteristics of Montgomery County's Residential Zoning Supply--Density, - Structure Type, and Sewerage Service Categories

Based upon existing zoning, the total dwelling unit potential of vacant and redevelopable residential land in Montgomery County is 174,000 units. If all of this supply were used, there would be a 84 percent increase over the current housing stock of 208,000 units. This zoning supply includes large amounts of capacity for all the major residential housing types (single family detached, townhouses, garden, mid-rise, and high-rise units) and densities (from 1 unit for 25 acres to 100 units per acre). Using the adopted Intermediate forecast rate of 4,000 units per year, it would appear that the total magnitude of the supply is sufficient for many decades of development.

While it may seem reasonable to conclude that the overall supply is adequate because the magnitude is relatively large, it is necessary to study the components of the capacity in detail before a valid assessment can be made. The "adequacy" issue is complicated since the supply can be evaluated from several standpoints, depending upon one's perspective. For example, location, structure type, density, and ownership are all factors which can be used to judge the adequacy of the vacant land supply. Further, we have searched the literature and questioned the experts but have not found a normative standard for determining the correct ratio of land supply to market demand so as to provide sufficient market flexibility to avoid excessive land prices.

While this report does not attempt to definitively resolve the question of the adequacy of Montgomery County's residential zoned capacity, it does provide detailed information on the current land supply inventory which can help to clarify some of the major issues. It is expected that this initial report will encourage a discussion of the various land supply issues and that subsequent reports will be prepared to respond to requests for special information and analysis.

### Land Within The Sewerage Service Envelope

The potential availability of land for development is related to whether or not public sewerage service is planned for the land and if the land is vacant or requires redevelopment. Land assigned sewerage service categories 1-5 is considered to be "within the sewerage service envelope." Land in categories 1-3 is especially important since the owners may apply for a preliminary subdivision plan and/or a sewer service authorization. Chart 1 shows that of the total residential zoning supply, 70 percent is within the current adopted sewerage service envelope. Redevelopment potential makes up 9 percent of the County's total residential dwelling unit supply, and 15 percent of the capacity within the sewerage service envelope. The redevelopment potential represents an estimate of the probable ultimate residential redevelopment yield for the County's Transit Station and CBD areas. The sum of the redevelopment capacity for all of these areas is approximately 15,600 units. This redevelopment capacity is primarily designed for high-rise and mid-rise units. Unfortunately, it is expected that only a small amount of this redevelopment capacity will be used by the construction industry over the next 10 years. The trend toward high interest rates and high construction costs have depressed the apartment market in general. When these factors are combined with the costs of redevelopment, it appears reasonable to speculate that no more than a few thousand units will be constructed on redeveloped land during the next decade. Therefore, in a practical sense, it is misleading to place equal emphasis on the redevelopment potential with the other major supply categories in Chart 1.



Vacant land in service categories 4 and 5 (12,400 unit potential) will also play a relatively minor role in the County's 10-year development horizon. However, such land is programmed for sewerage service and will become important in the following decade. Zoning capacity outside the sewerage service envelope (51,800 unit potential) can be divided between rural and vacant non-rural. The rural capacity estimate anticipates the implementation of the recently adopted Functional Master Plan for the Preservation of Agriculture and Rural Open Space in Montgomery County and the total may have to be slightly adjusted after the sectional map amendment is filed. The rural or wedge areas are encouraged to remain in farming and very low density residential and open space and not develop at urban/suburban densities. The current intermediate forecast pace for non-rural zoned land outside the sewerage service envelope is expected to be less than 400 units per year if past patterns continue (see Table 1). Therefore, this land will only contribute between 5 and 10 percent of the County's total residential construction during the next 10 years. However, some percentage of the vacant land presently outside the sewerage service envelope, but having a higher density than rural zoning, is expected to be included in the envelope when planning conditions are appropriate. Thus, part of this land is reserved for future development. The non-rural zoned land which is outside the sewerage service envelope is mostly planned for large and medium sized lots with R-200 zoning comprising 75 percent of this non-rural zoning total of 46,000 units.

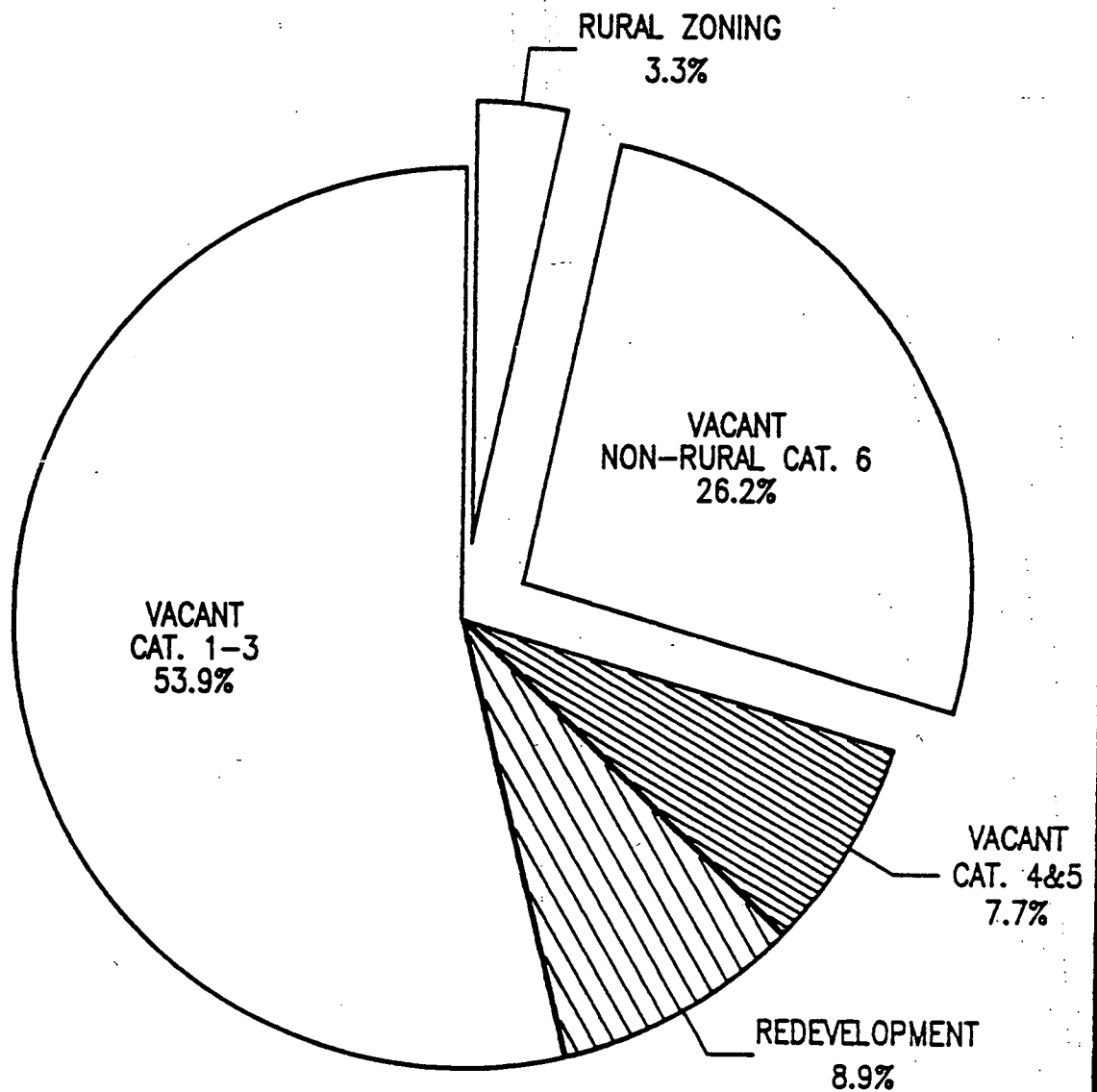
TABLE 1  
HOUSING UNIT COMPLETION ON SEPTIC SYSTEMS  
1960-1979  
MONTGOMERY COUNTY

<u>Year</u>	<u>Number Units on Septic Systems</u>	<u>Year</u>	<u>Number Units on Septic Systems</u>
1960	321	1970	262
1961	708	1971	396
1962	669	1972	427
1963	605	1973	439
1964	672	1974	317
1965	654	1975	295
1966	437	1976	229
1967	456	1977	301
1968	316	1978	604
1969	324	1979	370

SOURCE: MCPB, Research Division.

# CHART 1: PROPORTIONAL DISTRIBUTION OF RESIDENTIAL DWELLING UNIT ZONING CAPACITY

Vacant within the Sewer Envelope (cat. 1-5), Redevelopment,  
Non-Rural outside the Sewer Envelope (cat. 6),  
and Rural Zoning (total capacity = 175,000 units)  
Montgomery County



Vacant land within service categories 1-3 should be the focus of any attempt to evaluate the adequacy of the supply of residential land available for development. The dwelling unit potential within categories 1-3 is 94,300 units. Table 2 shows that the vast majority of Montgomery County's higher density zoning (small lot and higher densities) supply is within sewerage service categories 1-3. These higher densities are more appropriate for middle, moderate, and lower cost housing than the large lot and medium lot densities.

Chart 2 shows the Countywide proportional distribution of vacant dwelling unit supply within service categories 1-3. Table 2 lists the supply for all service categories. The majority of this dwelling unit potential is in the small lot and garden apartment zoning groups. However, a significant proportion of the small lot and garden apartment capacity is in the non-euclidian "planned community" zones which include TS (Town Sector), PD (Planned Development), PRC (Planned Retirement Community), and PN (Planned Neighborhood). Land in the zones just mentioned generally develop as townhouses and small lot detached homes, and to a lesser extent, as garden apartments. Land within the planned community zones are likely to be controlled by large developers since these zones are designed for larger parcels of land and are less likely to be available for development by small builders than the euclidian small lot and garden zones such as R-90, R-60, R-30, and R-20 and the non-euclidian RT (townhouse) zones. The PRC is especially unique in that only one such project exists in Montgomery County, and the housing is generally restricted to one age group. It comprises a significant share of the vacant residential land in the highly developed Suburban Corridor of Montgomery County (see Map 1).

Chart 3 compares shares of dwelling unit capacity and acres zoned by structure type within sewerage service categories 1-3. Although a 62 percent share of the residential zoning capacity is in the small lot and garden apartment zones, the share of vacant land which is associated with these zones is only 34 percent of the total. It should be expected that the proportion of the land area associated with these zones is less than the dwelling unit potential since the small lot and garden apartment zones allow more dwelling units per acre than the large and medium lot zones. For the combined large and medium lot zoning groups, we find that they comprise 23 percent of the dwelling unit capacity, but 65 percent of the total vacant residential acres.

Chart 4 compares the percent distribution of vacant residential land within sewerage service categories 1-3 with existing development by structure type. The chart shows that there is a much larger percentage of existing Montgomery County development in the small lot categories (53 percent) than the percentage of small lot zoning in the vacant land supply (33 percent). However, the proportion which is zoned for garden apartments (29 percent) is actually greater than the proportion of existing residential development which is in the garden apartment category (16 percent). There are historical reasons for both of these proportional imbalances. Up until the 1950's essentially all of Montgomery County was zoned for small lots. Therefore, most of the development which occurred up to this time was on small lots. This development still makes up a large share of the existing dwelling units today. Garden apartment construction only became numerically significant in the 1960's when garden apartment zoning was increased. Most of the County's garden apartments were built after 1960.

# CHART 2: PROPORTIONAL DISTRIBUTION OF VACANT DWELLING

## UNIT ZONING CAPACITY BY ZONE

(Sewerage Service Categories 1-3)

Montgomery County

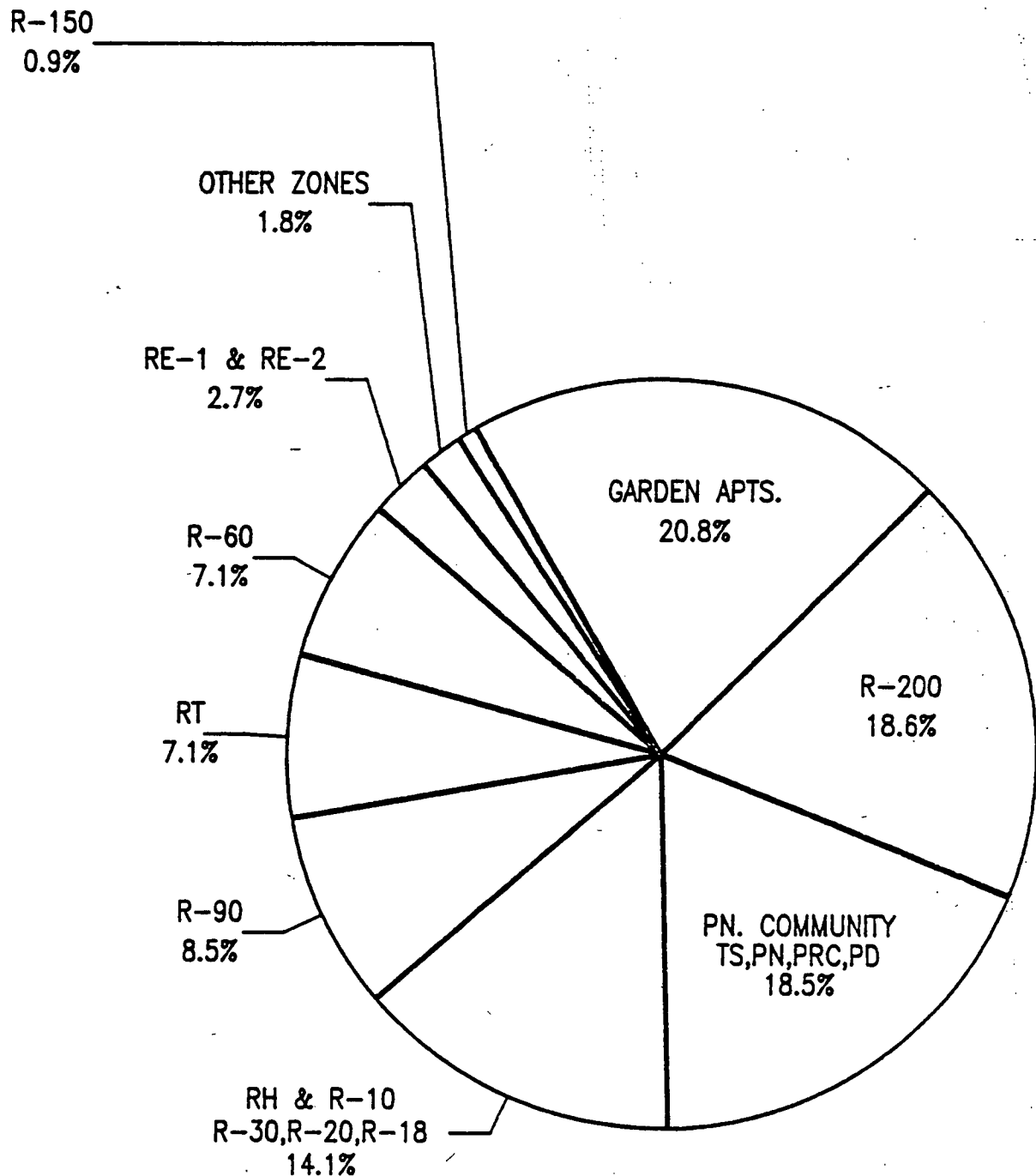


TABLE 2

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
<b>LARGE LOT</b>	<b>2,500</b>	<b>5,500</b>	<b>400</b>	<b>900</b>	<b>15,400</b>	<b>118,300</b>	<b>18,300</b>	<b>124,700</b>
RDTZ	-	-	-	-	3,500	84,000	3,500	84,000
Rural	-	-	-	-	2,300	13,400	2,300	13,400
RE-2	1,800	4,700	400	900	6,700	17,600	8,900	23,200
RE-1	700	800	-	-	2,900	3,300	3,600	4,100
<b>MEDIUM LOT</b>	<b>19,200</b>	<b>11,000</b>	<b>7,100</b>	<b>4,100</b>	<b>35,700</b>	<b>20,500</b>	<b>62,000</b>	<b>35,600</b>
RA	700	500	-	-	-	-	700	500
R-200	17,400	10,000	6,400	3,800	34,700	20,100	58,500	33,900
R-150	800	300	300	100	-	-	1,100	400
TRDZ	-	-	-	-	200	100	200	100
TRD-2	-	-	400	200	700	300	1,100	500
TRD-1	200	100	-	-	-	-	200	100
RMHZ	100	100	-	-	100	-	200	100
<b>SMALL LOT</b>	<b>31,300</b>	<b>6,800</b>	<b>2,500</b>	<b>500</b>	<b>400</b>	<b>100</b>	<b>34,200</b>	<b>7,400</b>
R-90	8,000	2,600	-	-	-	-	8,000	2,600
R-60	6,600	1,600	100	-	300	100	7,000	1,700
RT	6,600	600	400	100	100	-	7,100	700
TS	7,400	1,500	-	-	-	-	7,400	1,500
PN	800	200	1,000	300	-	-	1,800	500
PRC	-	-	1,000	100	-	-	1,000	100
PD-15	200	-	-	-	-	-	200	-
PD-13	200	-	-	-	-	-	200	-
PD-9	800	200	-	-	-	-	800	200
RMH	700	100	-	-	-	-	700	100
<b>GARDEN</b>	<b>27,400</b>	<b>1,900</b>	<b>1,800</b>	<b>400</b>	<b>300</b>	<b>-</b>	<b>29,500</b>	<b>2,300</b>
R-30	8,200	600	-	-	100	-	8,300	600
R-20	7,500	400	400	-	200	-	8,100	400
R-18	3,800	300	-	-	-	-	3,800	300
TS	4,100	300	-	-	-	-	4,100	300
PN	400	100	400	100	-	-	800	200
PRC	1,600	100	1,000	300	-	-	2,600	400
PD-15	200	-	-	-	-	-	200	-
PD-13	200	-	-	-	-	-	200	-
PD-9	1,400	100	-	-	-	-	1,400	100
<b>HIGH RISE</b>	<b>13,900</b>	<b>400</b>	<b>600</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>14,500</b>	<b>400</b>
RH	11,700	300	600	-	-	-	12,300	300
R-10	2,200	100	-	-	-	-	2,200	100
<b>TOTALS</b>	<b>94,300</b>	<b>25,600</b>	<b>12,400</b>	<b>5,900</b>	<b>51,800</b>	<b>138,900</b>	<b>158,500</b>	<b>170,400</b>

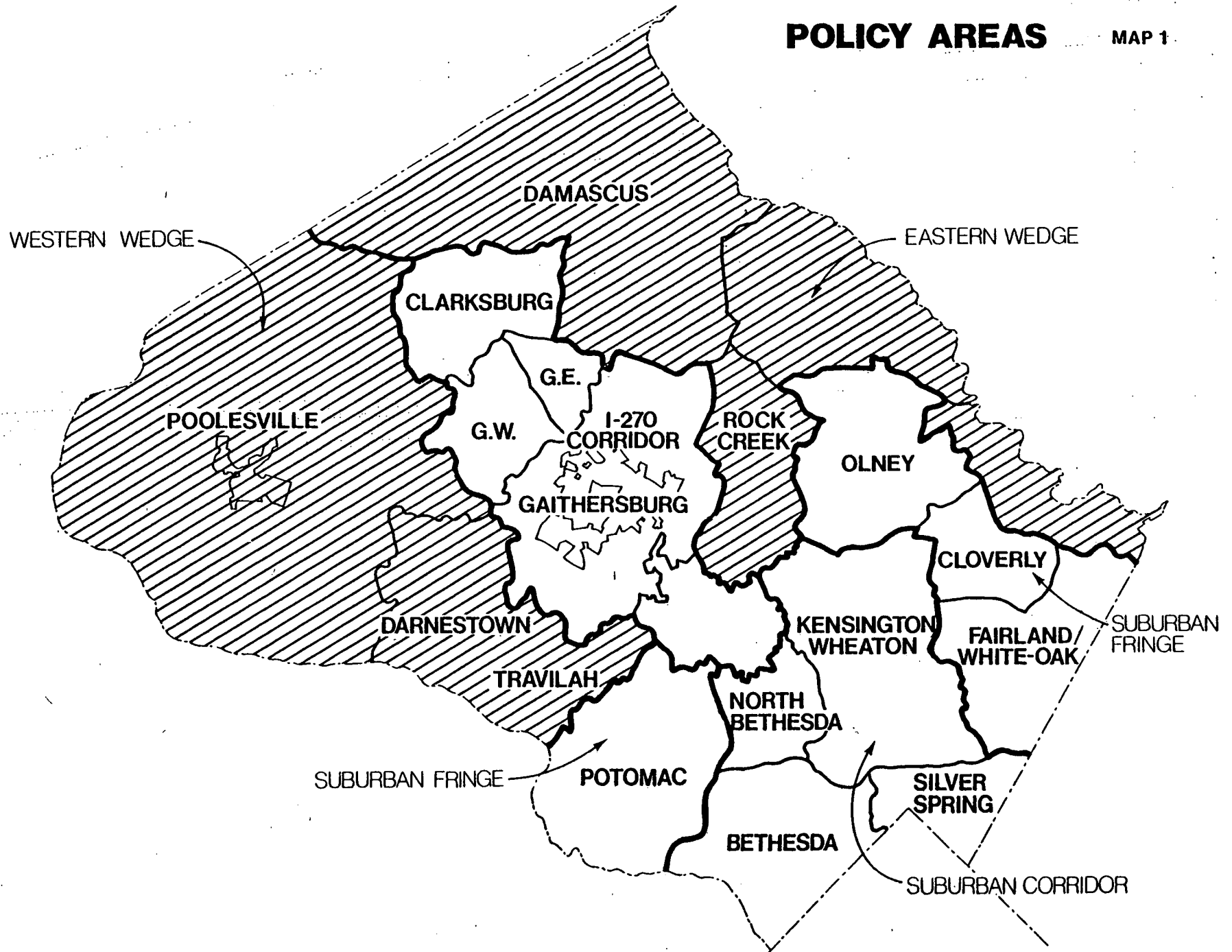
Numbers have been rounded to nearest hundredth.

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# POLICY AREAS

MAP 1

15



Source: MCPB -SPECIAL PROJECTS DIVISION

## SECTION 2

### Geographic Distribution of Residential Zoning Supply by Structure Type

Table 3 shows dwelling capacity by structure type for policy areas for land in sewerage service categories 1-3. This information is also portrayed graphically in Chart 5. The I-270 Corridor contains over 50 percent of Montgomery County's vacant residential zoning supply, with the two Germantown Policy Areas alone accounting for 27 percent of the County's total. Based upon its share of small lot (62 percent) and garden apartment (70 percent) zoning, it is expected that the I-270 Corridor will for many years in the future be the principal location of middle and moderate cost housing in Montgomery County. The land supply within the I-270 Corridor is well balanced with 15 percent of the capacity in large and medium lot zoning and 9 percent zoned for highrise units. Outside of the I-270 Corridor the only major concentration of garden apartment zoning is within the Fairland Policy Area. The Fairland Policy Area is also the only area within the Urban Fringe that has any measurable garden apartment and highrise capacity. Apartment zoning comprises 52 percent of the total supply within the Fairland Policy Area. While the Suburban Corridor accounts for 24 percent of the small lot zoning, this supply is spread out among many small parcels which tends to slow the pace of its development since each lot must be developed piecemeal. When redevelopment potential is added to the vacant highrise capacity, 60 percent of the residential supply in the Suburban Corridor is designed for high density development. The market for high-density residential development has been weak for many years. A combination of high interest rates, high construction costs, and high land costs currently limit the potential development of this zoning to prestige locations within the County, where high sales prices can be realized. This is because market conditions favor the development of luxury condominiums over rental projects. One exception would be the development of subsidized elderly housing.

Consistent with the General Plan, the Wedge Area contains very little zoning capacity in sewerage service categories 1-3. The small amounts which do exist are located in Poolesville and Damascus communities.

If present zoning and sewer policies remain generally the same, then the long-term development pattern will continue to follow the design of the General Plan. Higher densities will be confined to the CBD's and selected Transit Station Areas, in both the I-270 Corridor cities and the Suburban Corridor Areas. Medium density development will locate in the I-270 Corridor and the Suburban Fringe. Development densities will decline from the center to the outer edges of the sewer envelope where large lot zoning acts as a border to the rural open space and farmland wedge areas.

CHART 3: COMPARISON OF PERCENT SHARE OF VACANT RESIDENTIAL ZONING CAPACITY  
IN ACRES AND POTENTIAL DWELLING UNITS (SEWERAGE SERVICE CATEGORIES 1-3)  
(Total Residential Acres in Categories 1-3 = 25,900)  
Montgomery County

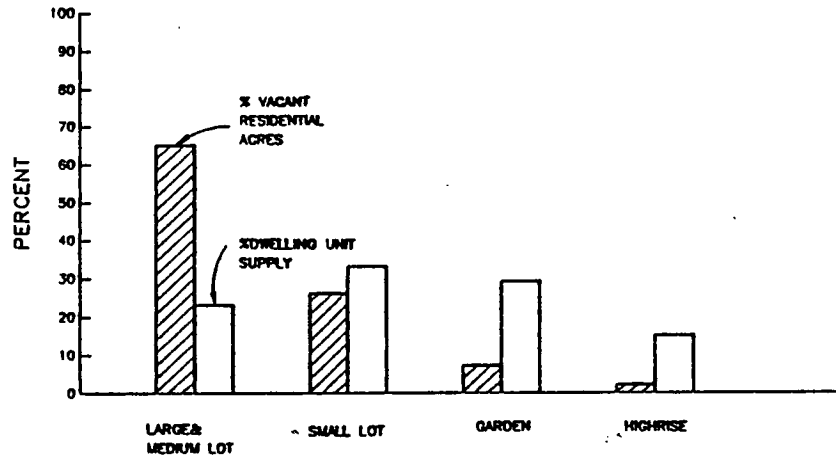


CHART 4: PERCENT DISTRIBUTION OF VACANT RESIDENTIAL DWELLING UNIT ZONING SUPPLY  
(SEWERAGE SERVICE CATEGORIES 1-3) VS. DISTRIBUTION OF EXISTING DEVELOPMENT  
Montgomery County

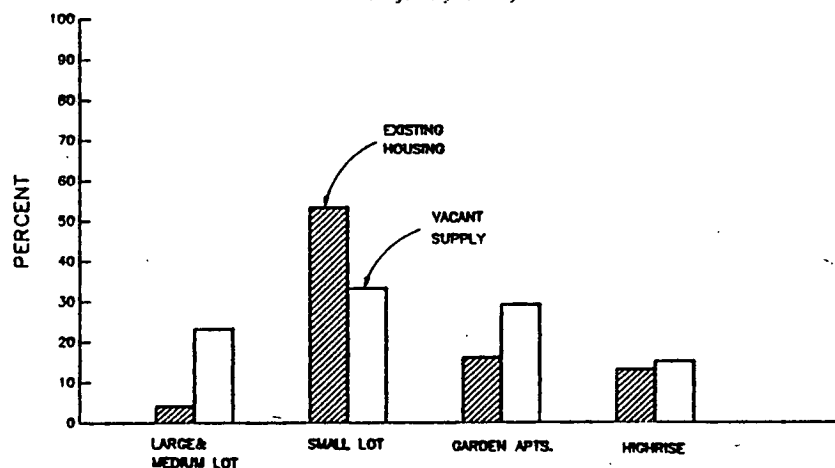




TABLE 3

DWELLING UNIT SUPPLY BY STRUCTURE TYPE FOR POLICY AREAS  
ON VACANT AND REDEVELOPABLE LAND  
SEWERAGE SERVICE CATEGORIES 1-3 ONLY, EXISTING ZONING  
MONTGOMERY COUNTY

Category Zoning Density Range (Units Per Acre)	Large Lot RE-2/ RE-1 .5-1.0	Medium Lot R-200/ R-150 2.0-2.5	Small Lot R-90/ R-60/R-T 5-12	Garden R-30/R-20 12.0-14.5	High Rise RH/R-10 43.5	Redevelop- ment CBD + Transit Areas 43.5-100	Totals
<b>WEDGE AREAS</b>	600	1,600	600	-	-	-	2,800
Western Wedge	600	900	100	-	-	-	1,600
Eastern Wedge	-	700	500	-	-	-	1,200
<b>SUBURBAN FRINGE</b>	1,700	8,300	3,700	3,800	2,000	-	19,500
Olney	500	2,200	100	-	-	-	2,800
Cloverly	-	1,800	-	-	-	-	1,800
Potomac	1,100	1,300	1,500	-	-	-	3,900
Fairland	100	3,000	2,100	3,800	2,000	-	11,000
<b>I-270 CORRIDOR</b>	200	7,400	19,500	19,100	4,500	-	50,700
Clarksburg	-	-	-	-	-	-	-
Germantown W	-	1,000	6,300	11,500	1,200	-	20,000
Germantown E	-	300	4,200	700	400	-	5,600
Gaithersburg	200	6,100	9,000	6,900	2,900	-	25,100
<b>SUBURBAN CORRIDOR</b>	-	1,800	7,500	4,500	7,300	15,600	36,700
Kensington	-	1,100	3,200	2,900	1,600	2,300	11,100
Silver Spring	-	-	1,200	200	1,400	6,300	9,100
North Bethesda	-	300	900	900	3,100	4,900	10,100
Bethesda	-	400	2,200	500	1,200	2,100	6,400
<b>TOTALS</b>	2,500	19,100	31,300	27,400	13,800	15,600	109,700

NOTE: For Planned Community Zones (TS, PD, PN, PRC), developers were interviewed and plans were reviewed for expected unit type mix, however, when sufficient information was not available a 50/50 split was assumed for a planned development. The 20,700 dwelling unit capacity within these zones was divided between small lot (11,300 units) and garden (9,400 units).

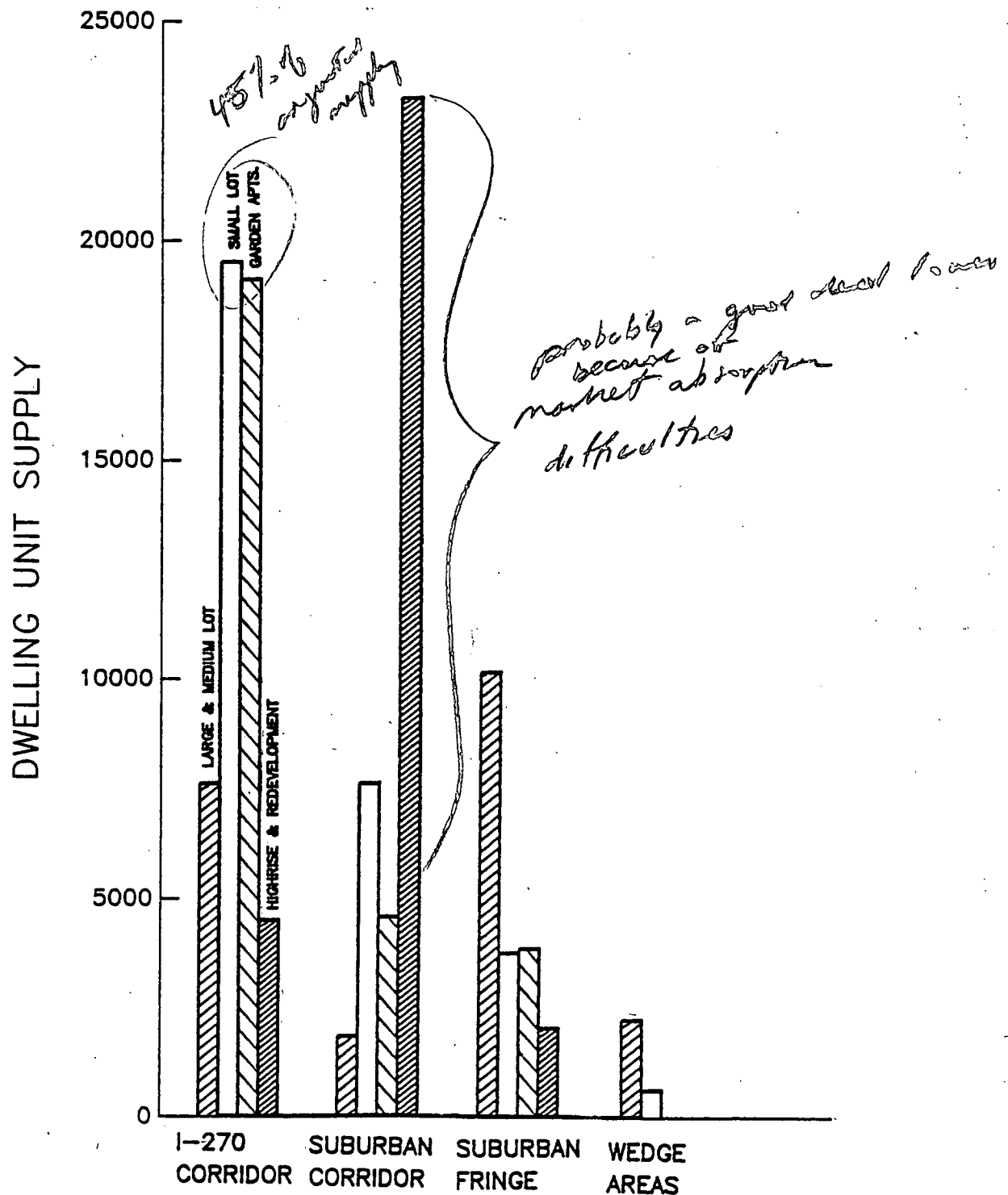
Numbers have been rounded to nearest hundredths.

SOURCE: Land Data Bank MCPB: Special Projects Division.

# CHART 5: DISTRIBUTION OF DWELLING UNIT SUPPLY

## BY STRUCTURE TYPE FOR POLICY AREAS

(Sewerage Service Categories 1-3)  
Montgomery County



## SECTION 3

### Issues: Small Lot and Garden Apartment Zoning Supply

The adequacy of the supply of small lot and garden apartment zoning is raised as an issue, although the overall magnitudes for the supply capacity of small lot (31,300 units) and garden apartment (27,400 units) zoning appear relatively large in service categories 1-3. A study of the detailed data show that there are differing perceptions of the adequacy of the supply because large amounts of the supply are clustered into certain geographic areas and zoning classifications. In order to better understand why there is an issue, it is helpful to look at the following:

1. Zoning Classification
2. Location
3. Parcel Size
4. Land Absorption Rates

#### 1. Zoning Classification

A large proportion of the small lot and garden apartment zoning potential is controlled by a few developers. Chart 6 shows that 29 percent of the garden apartment zoning capacity in service categories 1-3 is contained in the planned community zones (TS, PD, PN, PRC). Chart 7 shows that a slightly larger percentage of the small lot zoning is found in planned community zones (31 percent). The planned community zones generally have larger minimum land area requirements than the R-90, R-60, R-30, R-20 and RT Zones and this discourages use by smaller builders and developers. While approximately 2,600 acres are classified in the planned community zones, this land is controlled by relatively few landowners and developers. Therefore, a large share of land with garden apartments and small lot capacity is not readily available to smaller builders and developers. This land, however, will contribute a significant share of the dwelling unit completions during the decade.

#### 2. Location

Most of the supply of small lot and garden apartment zoning capacity in sewerage service categories 1-3 is clustered in relatively few geographic areas. Compared to the County, the I-270 Corridor accounts for 62 percent of the small lot and 70 percent of the garden apartment capacity. The Germantown Policy areas alone have close to 50 percent of the County's garden apartment capacity. Outside of the I-270 Corridor, the only major concentrations for garden apartment zoning are in the Kensington (11 percent) and the Fairland Policy Areas (14 percent). This situation is similar for the small lot category, although a large number of units could be built on scattered parcels within the Suburban Corridor. (See Charts 8 and 9.)

CHART 6: PROPORTIONAL DISTRIBUTION OF GARDEN APARTMENT  
ZONING CAPACITY BY ZONE  
(SEWERAGE SERVICE CATEGORIES 1-3)  
MONTGOMERY COUNTY

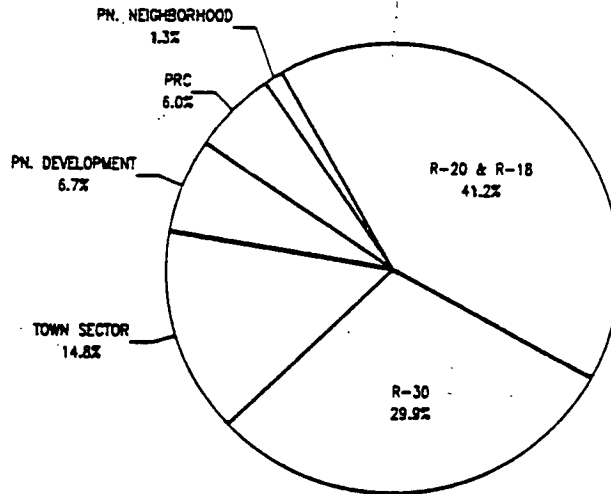


CHART 7: PROPORTIONAL DISTRIBUTION OF SMALL LOT  
ZONING CAPACITY BY ZONE  
(SEWERAGE SERVICE CATEGORIES 1-3)  
MONTGOMERY COUNTY

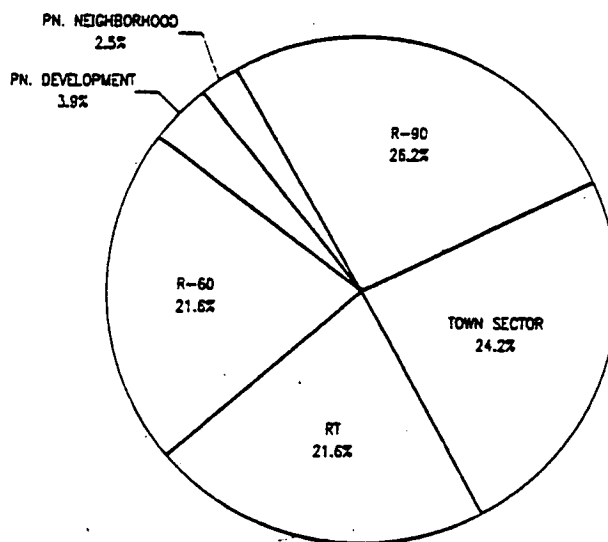


CHART 8: DISTRIBUTION OF GARDEN APARTMENT  
ZONING SUPPLY BY POLICY AREAS  
(Sewerage Service Categories 1-3)  
Montgomery County

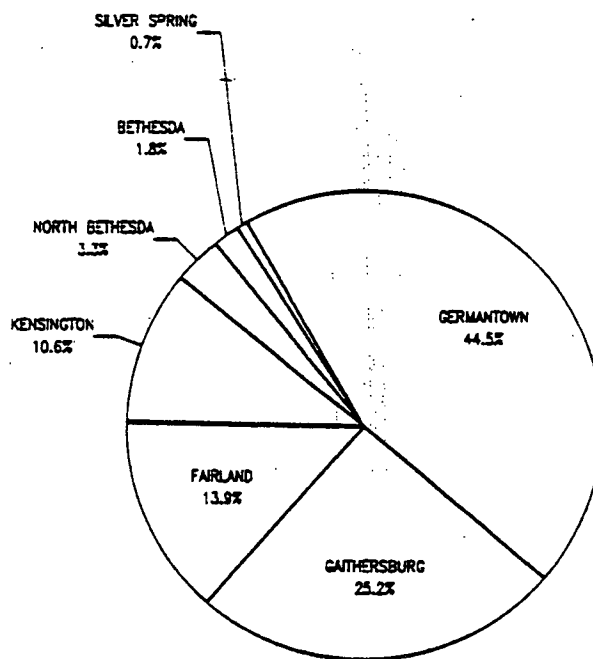
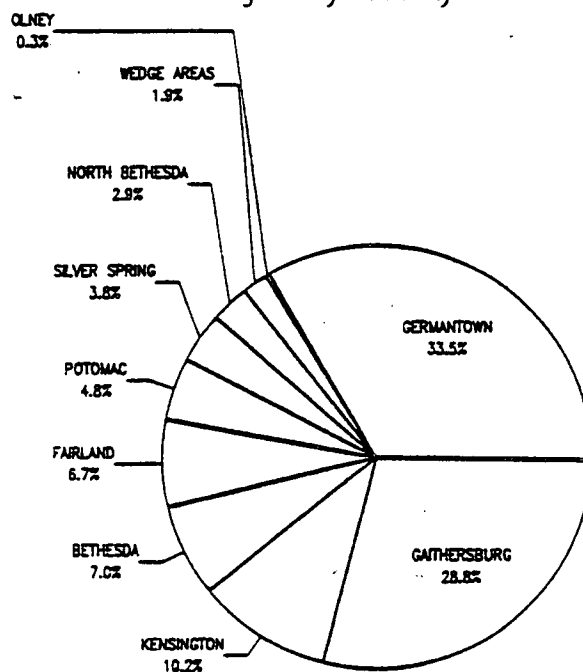


CHART 9: DISTRIBUTION OF SMALL LOT  
ZONING CAPACITY BY POLICY AREAS  
(Sewerage Service Categories 1-3)  
Montgomery County



### 3. Parcel Size

When the capacity in the planned community zones is excluded, the majority of garden apartment and small lot capacity is located on parcels of less than 10 acres. Tables 4 and 5 show the distribution of small lot and garden apartment zoned capacity by parcel size. The capacity of the planned community zones are excluded. The Tables clearly show that large parcels are scarce even within the I-270 Corridor. Almost all of the small lot capacity in the Suburban Corridor is located on small parcels, most of which consist of scattered lots within existing subdivisions. Since this proportion will develop piecemeal and has high land values, it will develop slowly and will not provide a large share of the growth over the decade. Therefore, to some extent, the small lot capacity in the Suburban Corridor overstates the total Countywide magnitude of the small lot capacity.

### 4. Land Absorption Rates

Higher mortgage, construction, and energy costs will likely increase the future demand for small lot zoning capacity relative to large and medium lot. Chart 10 shows that there has been a gradual but continuous increase in the proportion of small versus large lot preliminary plans. Charts 11 and 12 show that this tendency is even stronger for dwelling unit completions and building permit applications. It seems reasonable to speculate that the current trends toward higher mortgage, construction, and energy costs will accelerate this shift toward the construction of small lot relative to the larger lot homes. Provided mortgage funds are available, these trends will have less of a negative impact on the developers and builders who have access to the small lot and garden apartment land in the planned community zones. On the other hand, economic and energy conditions could so severely limit the usefulness of large lot, medium lot, and highrise land that the supply within the service envelope is effectively reduced by over one-third. Such conditions would warrant a larger proportion of small lot and garden apartment land.

CHART 10: PROPORTIONAL SHARE OF SMALL LOT UNITS OF ALL SINGLE FAMILY UNITS

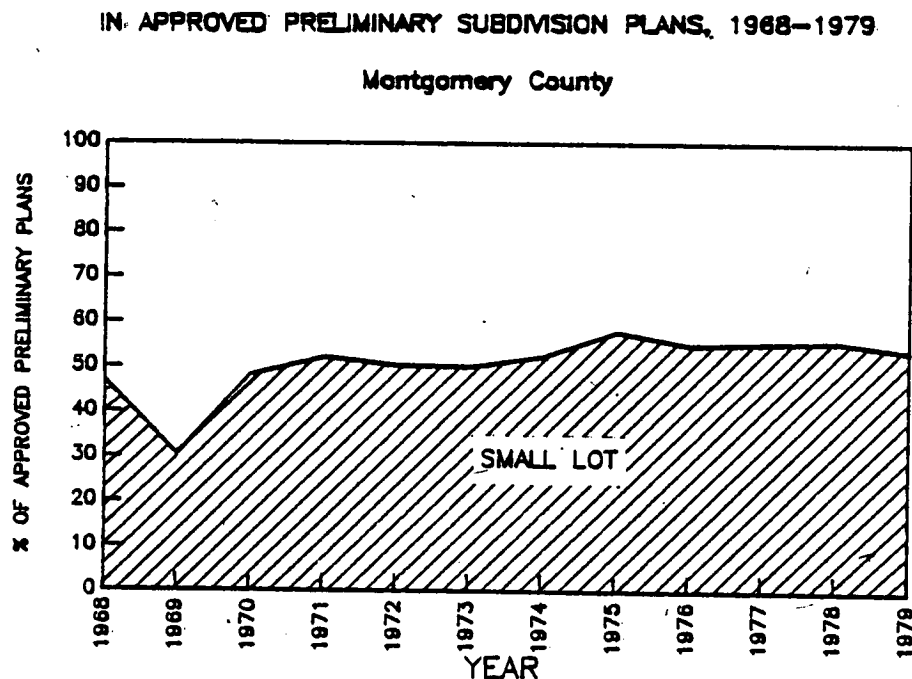


TABLE 4

SMALL LOT<sup>1</sup> (R-90, R-60, R-40, RT) ZONED VACANT LAND  
BY PARCEL SIZE, ALL SEWERAGE SERVICE CATEGORIES  
MONTGOMERY COUNTY

	0-10 Acres		11-20 Acres		21-50 Acres		51 or More Acres		Total	
	Parcel	Acreage	Parcels	Acreage	Parcels	Acreage	Parcels	Acreage	Parcels	Acreage
Wedge Areas	24	35	3	43	-	-	-	-	27	78
Western Wedge	8	6	-	-	-	-	-	-	8	6
Eastern Wedge	16	29	3	43	-	-	-	-	19	72
Suburban Fringe	1,306	567	9	123	7	236	2	157	1,324	1,083
Olney	16	24	1	12	-	-	1	56	18	92
Cloverly	4	5	-	-	-	-	-	-	4	5
Potomac	345	180	5	70	4	156	-	-	354	406
Fairland	941	358	3	41	3	80	1	101	948	580
I-270 Corridor	1,125	373	3	43	14	458	8	685	1,150	1,559
Clarksburg	-	-	-	-	-	-	-	-	-	-
Germantown W	462	82	2	43	3	100	24	277	471	490
Germantown E	35	60	1	-	3	92	3	273	42	437
Gaithersburg	628	231	-	-	8	266	1	135	637	632
Suburban Corridor	4,934	1,491	17	420	3	100	2	138	4,956	2,149
Kensington	1,688	584	7	261	-	-	-	-	1,695	845
Silver Spring	1,031	268	-	-	-	-	-	-	1,031	268
North Bethesda	433	160	6	97	3	100	1	63	443	420
Bethesda	1,782	479	4	62	-	-	1	75	1,787	616
TOTALS	7,389	2,466	32	629	24	794	12	980	7,457	4,869

<sup>1</sup> Excludes Planned Community Zones (TS, PD, PN, PRC).

SOURCE: Land Data Bank, MCPB: Special Projects Division.

TABLE 5

GARDEN APARTMENT<sup>1</sup> (R-30, R-20, R-18) ZONED VACANT LAND  
BY PARCEL SIZE, ALL SEWERAGE SERVICE CATEGORIES  
MONTGOMERY COUNTY

	0-10 Acres		11-20 Acres		21-50 Acres		51 or More Acres		Total	
	Parcel	Acreage	Parcels	Acreage	Parcels	Acreage	Parcels	Acreage	Parcels	Acreage
Wedge Areas	2	7	-	-	-	-	-	-	2	7
Western Wedge	-	-	-	-	-	-	-	-	-	-
Eastern Wedge	2	7	-	-	-	-	-	-	2	7
Suburban Fringe	12	32	3	50	4	166	-	-	19	248
Olney	2	1	-	-	-	-	-	-	2	1
Cloverly	-	-	-	-	-	-	-	-	-	-
Potomac	1	3	-	-	-	-	-	-	1	3
Fairland	9	28	3	50	4	166	-	-	16	244
I-270 Corridor	285	98	3	48	9	274	3	561	300	981
Clarksburg	1	2	-	-	-	-	-	-	1	2
Germantown W	5	21	1	18	4	132	1	313	11	484
Germantown E	2	10	-	-	-	-	-	-	2	10
Gaithersburg	277	65	2	30	5	142	2	248	286	485
Suburban Corridor	106	71	3	52	1	30	-	-	110	153
Kensington	23	32	2	41	-	-	-	-	25	73
Silver Spring	43	12	-	-	-	-	-	-	43	12
North Bethesda	3	2	-	-	1	30	-	-	4	32
Bethesda	37	25	1	11	-	-	-	-	38	36
TOTALS	405	208	9	150	14	470	3	561	431	1,389

<sup>1</sup> Excludes Planned Community Zones (TS, PD, PN, PRC).

SOURCE: Land Data Bank, MCPB: Special Projects Division.



CHART 11: PROPORTIONAL SHARE OF HOUSING COMPLETIONS FOR TOWNHOUSES

OF ALL SINGLE FAMILY UNITS, 1970-1979

Montgomery County

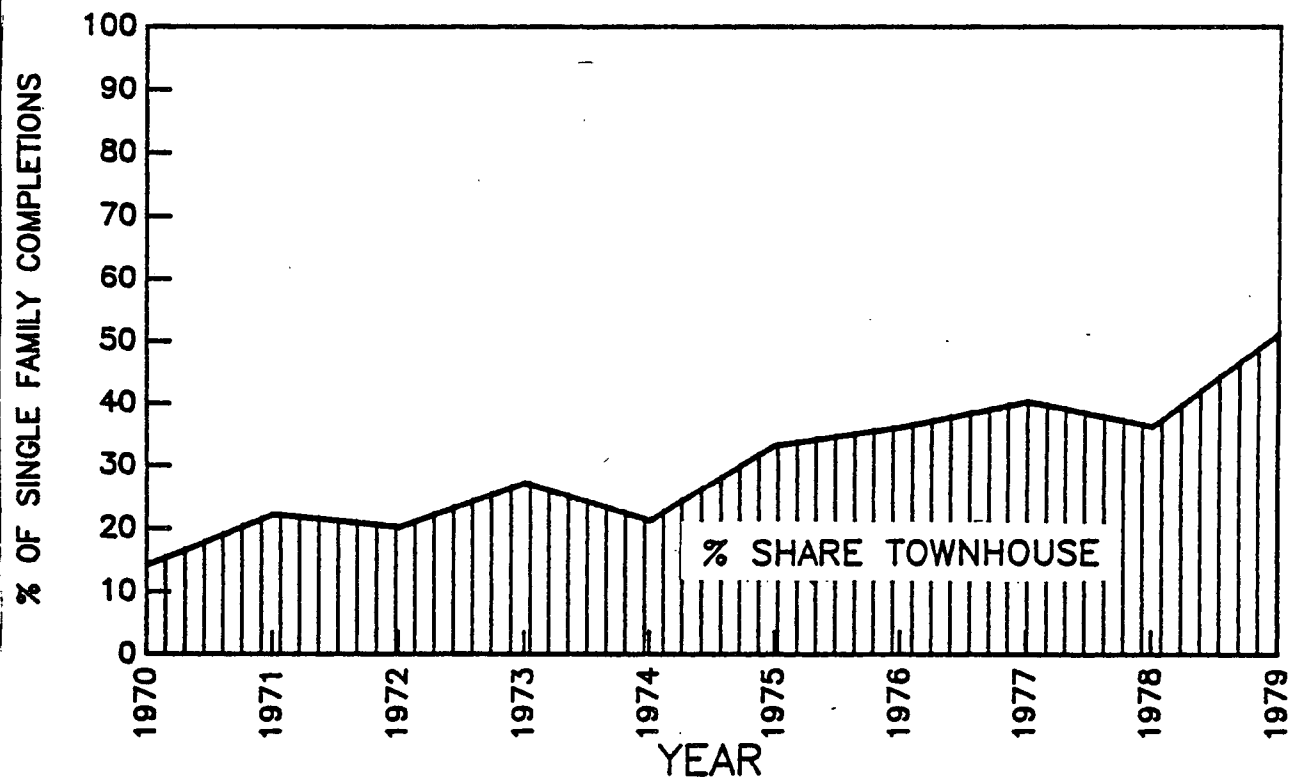
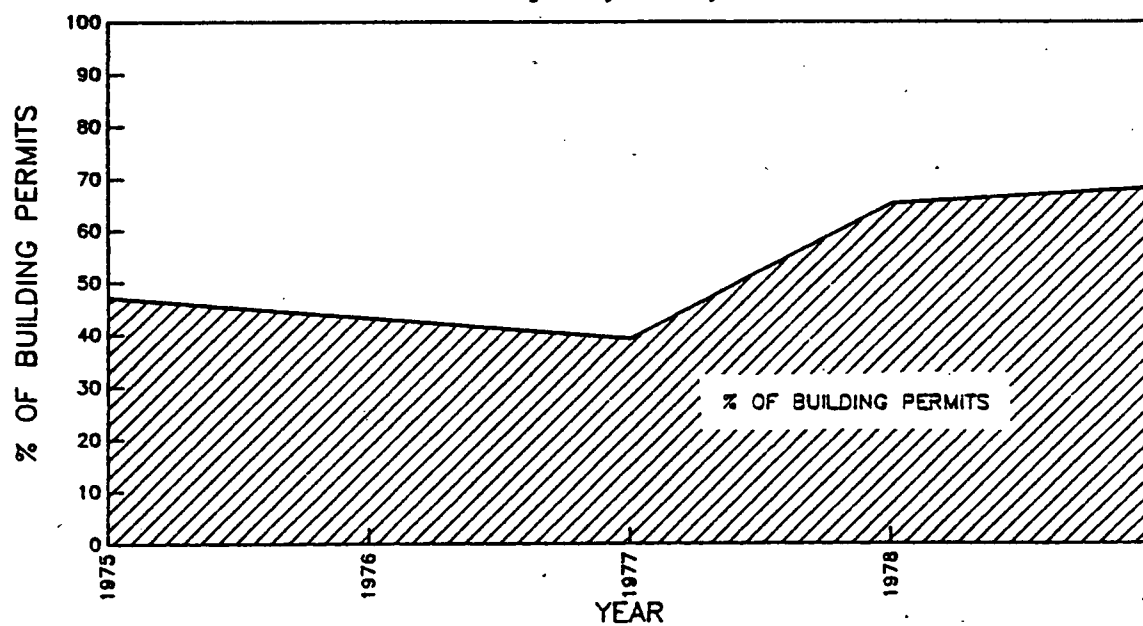


CHART 12: PROPORTIONAL SHARE OF BUILDING PERMITS FOR SMALL LOT UNITS

VS. LARGE LOT UNITS, 1975-1979

Montgomery County



## SECTION 4

### Detailed Vacant Residential Zoning Supply Inventory by Policy Areas

Tables 6-23 and Charts 13-27 show in detail the acreage and dwelling unit potential of the residential zoning supply for each Policy Area. Existing zoning is used, with the exception of anticipated sectional map amendments which are in the process of being completed for the Potomac Subregion, Olney, and the Functional Master Plan for the Preservation of Agriculture and Open Space. The dwelling unit potential for each zone is estimated by first applying a zoning density factor, and second, a net development factor to land which is considered to have development potential. A fuller discussion of the approach used is given in the Appendix.

The information tabulated in the following tables is extracted from the Montgomery County Planning Board's Land Data Bank System. An extensive effort to develop this system was begun in 1977 when the initial output was presented in the Fourth Annual Growth Policy Report--Carrying Capacity and Adequate Public Facilities. The land use information, which can be retrieved from the system, is an important component of the Planning Board's integrated growth management accounting system. The objective is to efficiently report data, on a timely basis, in both tabular and graphic formats.

Currently, the Special Projects Division staff is improving the accessibility and productivity of the system to planners and policy makers by developing interactive programs which allow non-programmers to query the data themselves without the aid of a programmer. In addition, the Commission has acquired a computer graphics program which allows graphics to be prepared directly from the data without the use of drafting support. All of the charts found in this report have been prepared using this computer graphics program.

Future additions to the Land Data Bank System include the development of an interactive computerized system for monitoring development and change in the CBD and Transit Station Areas.

# CHART 13: DWELLING UNIT CAPACITY ON VACANT LAND

## SEWER AGE SERVICE CATEGORIES 1-6

Wedge Area Policy Areas, Montgomery County

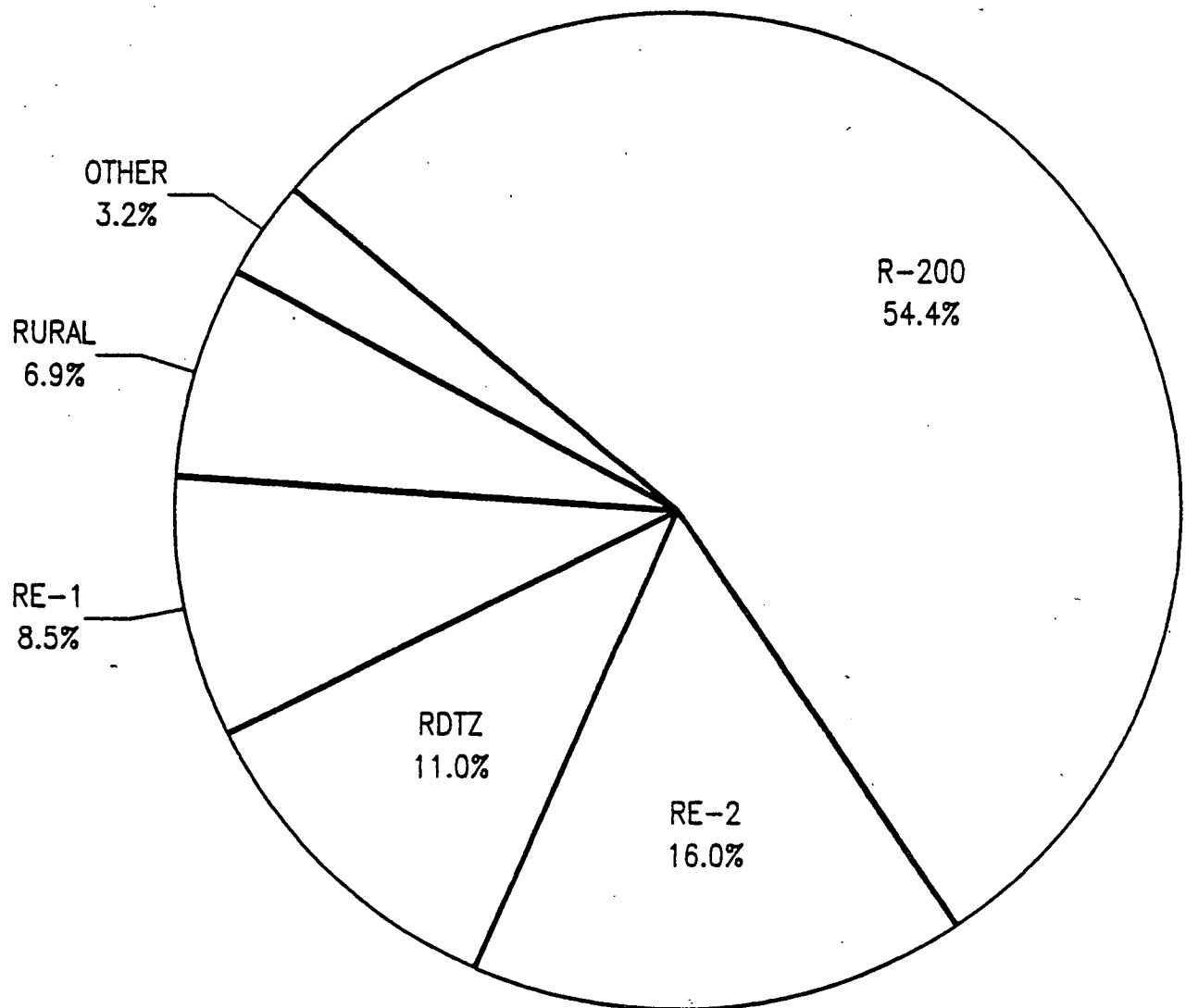


TABLE 6

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORIES  
SUMMARY: WEDGE POLICY AREAS  
MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
LARGE LOT	580	1,481	-	-	13,140	112,108	13,720	113,589
RDTZ	-	-	-	-	3,540	83,548	3,540	83,548
Rural	-	-	-	-	2,280	13,352	2,280	13,352
RE-2	580	1,481	-	-	4,580	12,103	5,160	13,584
RE-1	-	-	-	-	2,740	3,105	2,740	3,105
MEDIUM LOT	1,590	916	130	79	16,170	9,688	17,890	10,683
R-200	1,470	854	130	79	15,950	9,579	17,550	10,512
R-150	10	5	-	-	-	-	10	5
RMHZ	110	57	-	-	50	24	160	81
TRDZ	-	-	-	-	170	85	170	85
SMALL LOT	510	59	-	-	80	18	590	77
R-90	50	17	-	-	40	14	90	31
RT	460	42	-	-	40	4	500	46
GARDEN	-	-	-	-	90	7	90	7
R-30	-	-	-	-	90	7	90	7
TOTALS	2,680	2,456	130	79	29,480	121,821	32,290	124,356

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 14: DWELLING UNIT CAPACITY ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-6

Western Wedge Policy Areas, Montgomery County

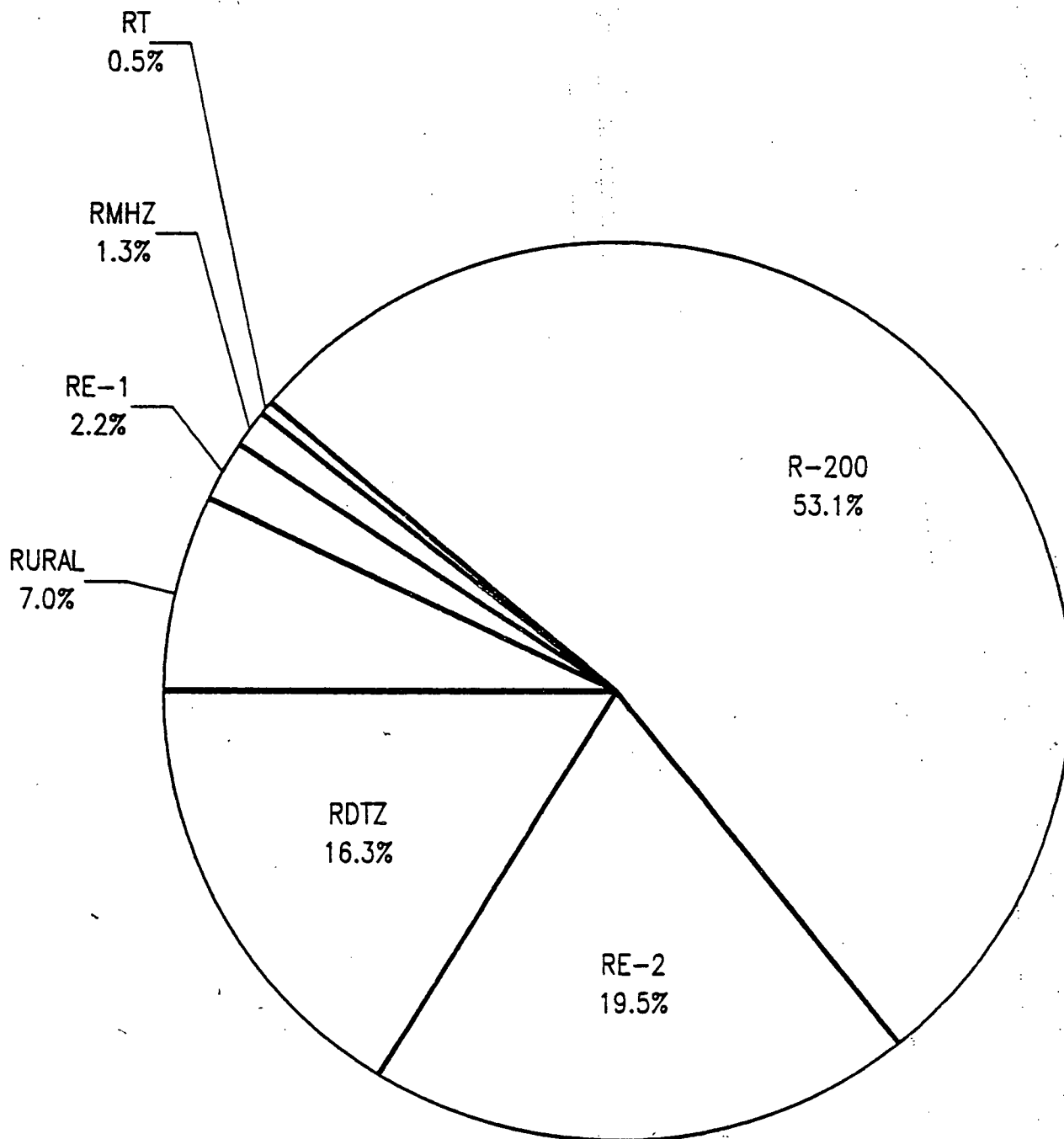


TABLE 7  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
WESTERN WEDGE POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	580	1,481	-	-	4,790	60,574	5,370	62,055
RDTZ	-	-	-	-	1,920	50,517	1,920	50,517
Rural	-	-	-	-	860	4,936	860	4,936
RE-2	580	1,481	-	-	1,750	4,803	2,330	6,284
RE-1	-	-	-	-	260	318	260	318
<u>MEDIUM LOT</u>	870	496	130	79	5,490	3,325	6,490	3,900
R-200	760	439	130	79	5,440	3,301	6,330	3,819
RMHZ	110	57	-	-	50	24	160	81
<u>SMALL LOT</u>	60	6	-	-	-	-	60	6
RT	60	6	-	-	-	-	60	6
<u>TOTALS</u>	1,510	1,983	130	79	10,280	63,899	11,920	65,961

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 15: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-6

Eastern Wedge Policy Areas, Montgomery County

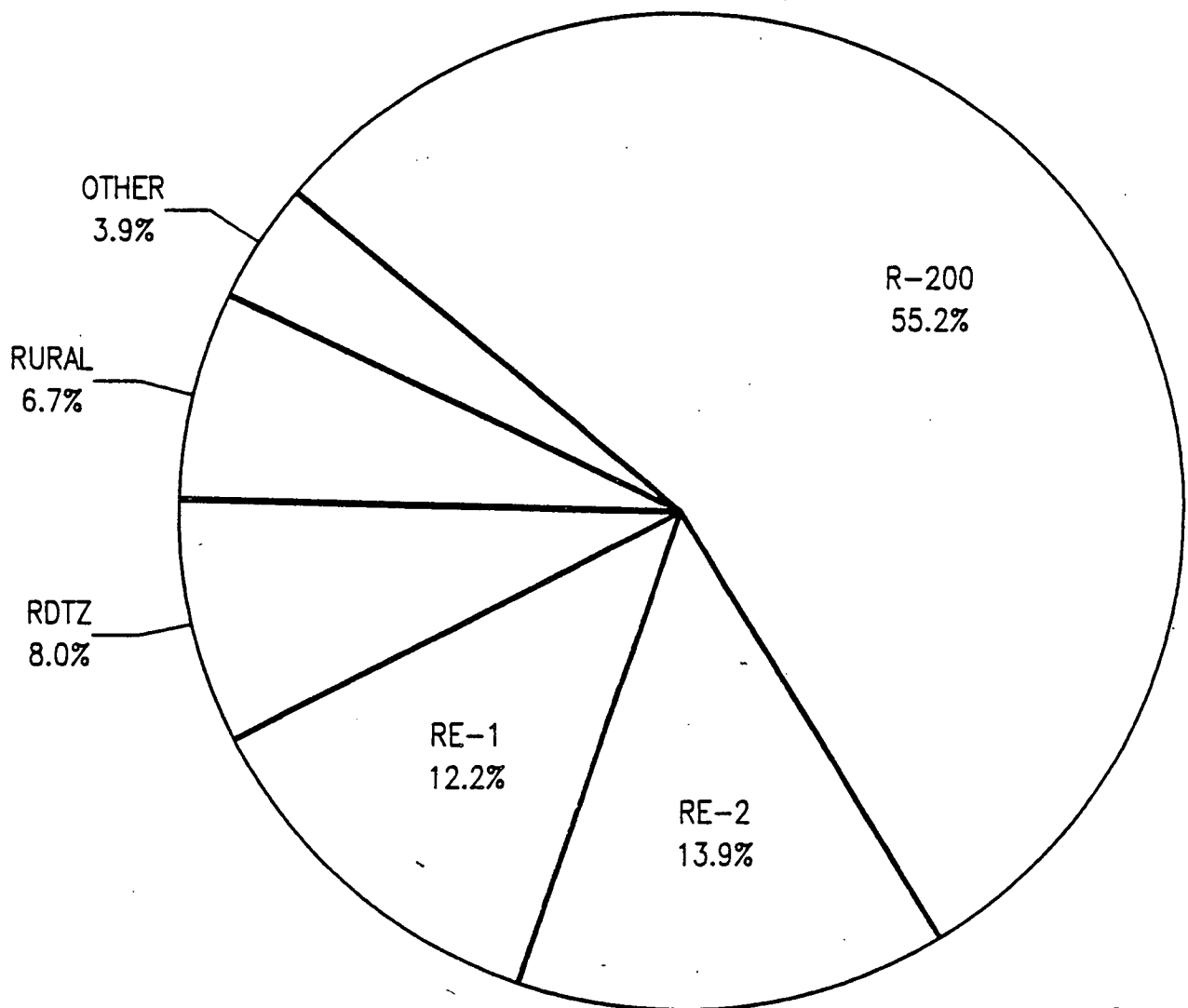


TABLE 8  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
EASTERN WEDGE POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	-	-	8,350	51,534	8,350	51,534
RDTZ	-	-	1,620	33,031	1,620	33,031
Rural	-	-	1,420	8,416	1,420	8,416
RE-2	-	-	2,830	7,300	2,830	7,300
RE-1	-	-	2,480	2,787	2,480	2,787
<u>MEDIUM LOT</u>	720	420	10,680	6,363	11,400	6,783
R-200	710	415	10,510	6,278	11,220	6,693
R-150	10	5	-	-	10	5
TRDZ	-	-	170	85	170	85
<u>SMALL LOT</u>	450	53	80	18	530	71
R-90	50	17	40	14	90	31
RT	400	36	40	4	440	40
<u>GARDEN</u>	-	-	90	7	90	7
R-30	-	-	90	7	90	7
<u>TOTALS</u>	1,170	473	19,200	57,922	20,370	58,395

SOURCE: Land Data Bank, MCPB: Special Projects Division.



# CHART 16: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Suburban Fringe Policy Areas, Montgomery County

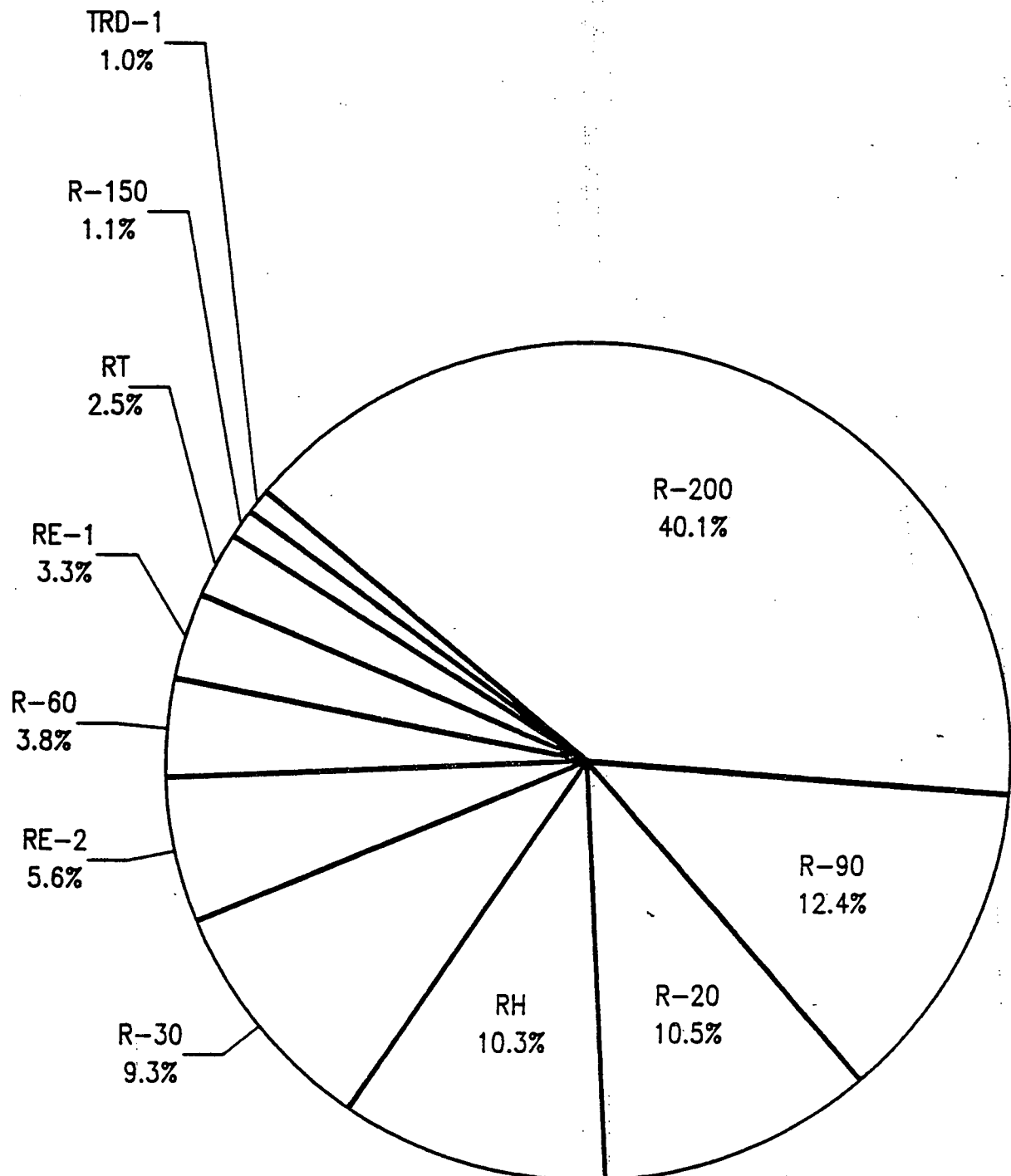


TABLE 9

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORIES  
SUMMARY: SUBURBAN FRINGE POLICY AREAS  
MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
LARGE LOT	1,750	3,530	330	889	1,940	5,477	4,020	9,896
RDTZ	-	-	-	-	10	446	10	446
Rural	-	-	-	-	10	53	10	53
RE-2	1,100	2,780	330	889	1,860	4,894	3,290	8,563
RE-1	650	750	-	-	60	84	710	834
MEDIUM LOT	8,280	4,710	2,670	1,581	1,340	751	12,290	7,042
R-200	7,870	4,524	2,150	1,328	680	420	10,700	6,272
R-150	220	92	110	47	-	-	330	139
TRD-2	-	-	410	206	660	331	1,070	537
TRD-1	190	94	-	-	-	-	190	94
SMALL LOT	3,680	1,012	60	15	260	56	4,000	1,083
R-90	2,440	816	10	2	-	-	2,450	818
R-60	740	149	50	13	260	56	1,050	218
RT	500	47	-	-	-	-	500	47
GARDEN	3,880	247	440	23	-	-	4,320	270
R-30	1,820	135	-	-	-	-	1,820	135
R-20	2,060	112	440	23	-	-	2,500	135
HIGH RISE	2,020	55	610	16	-	-	2,630	71
RH	2,020	55	610	16	-	-	2,630	71
TOTALS	19,610	9,554	4,110	2,524	3,540	6,284	27,260	18,362

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 17: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Olney Policy Area, Montgomery County

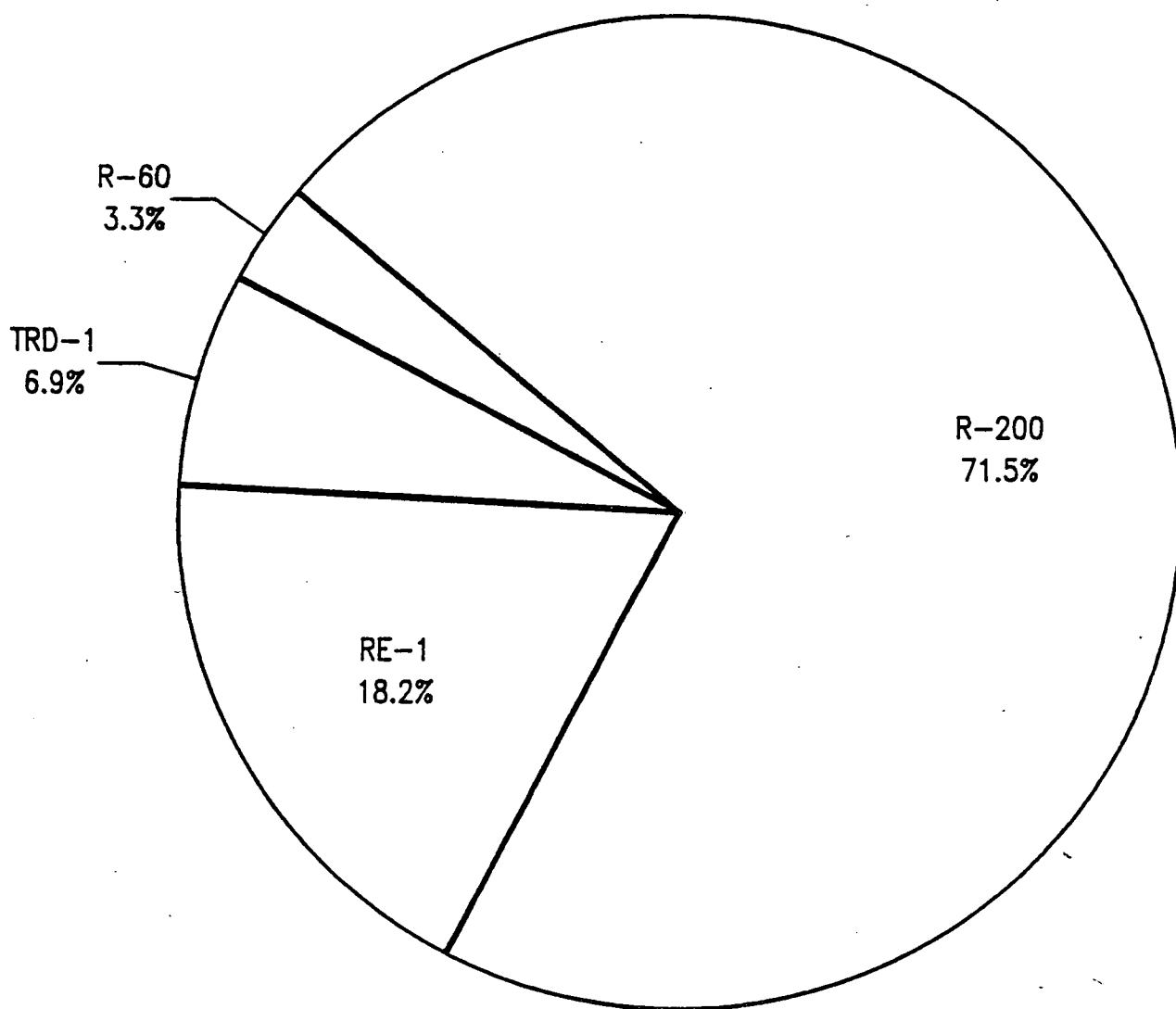


TABLE 10  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
OLNEY POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	<u>500</u>	<u>580</u>	<u>-</u>	<u>-</u>	<u>1,220</u>	<u>3,577</u>	<u>1,720</u>	<u>4,157</u>
RDTZ	-	-	-	-	10	446	10	446
RE-2	-	-	-	-	1,150	3,047	1,150	3,047
RE-1	500	580	-	-	60	84	560	664
<u>MEDIUM LOT</u>	<u>2,150</u>	<u>1,095</u>	<u>410</u>	<u>206</u>	<u>760</u>	<u>395</u>	<u>3,320</u>	<u>1,696</u>
R-200	1,960	1,001	-	-	100	64	2,060	1,065
TRD-2	-	-	410	206	660	331	1,070	537
TRD-1	190	94	-	-	-	-	190	94
<u>SMALL LOT</u>	<u>90</u>	<u>22</u>	<u>50</u>	<u>13</u>	<u>260</u>	<u>56</u>	<u>400</u>	<u>91</u>
R-60	90	22	50	13	260	56	400	91
<u>TOTALS</u>	<u>2,740</u>	<u>1,697</u>	<u>460</u>	<u>219</u>	<u>2,240</u>	<u>4,028</u>	<u>5,440</u>	<u>5,944</u>

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 18: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Cloverly Policy Area, Montgomery County

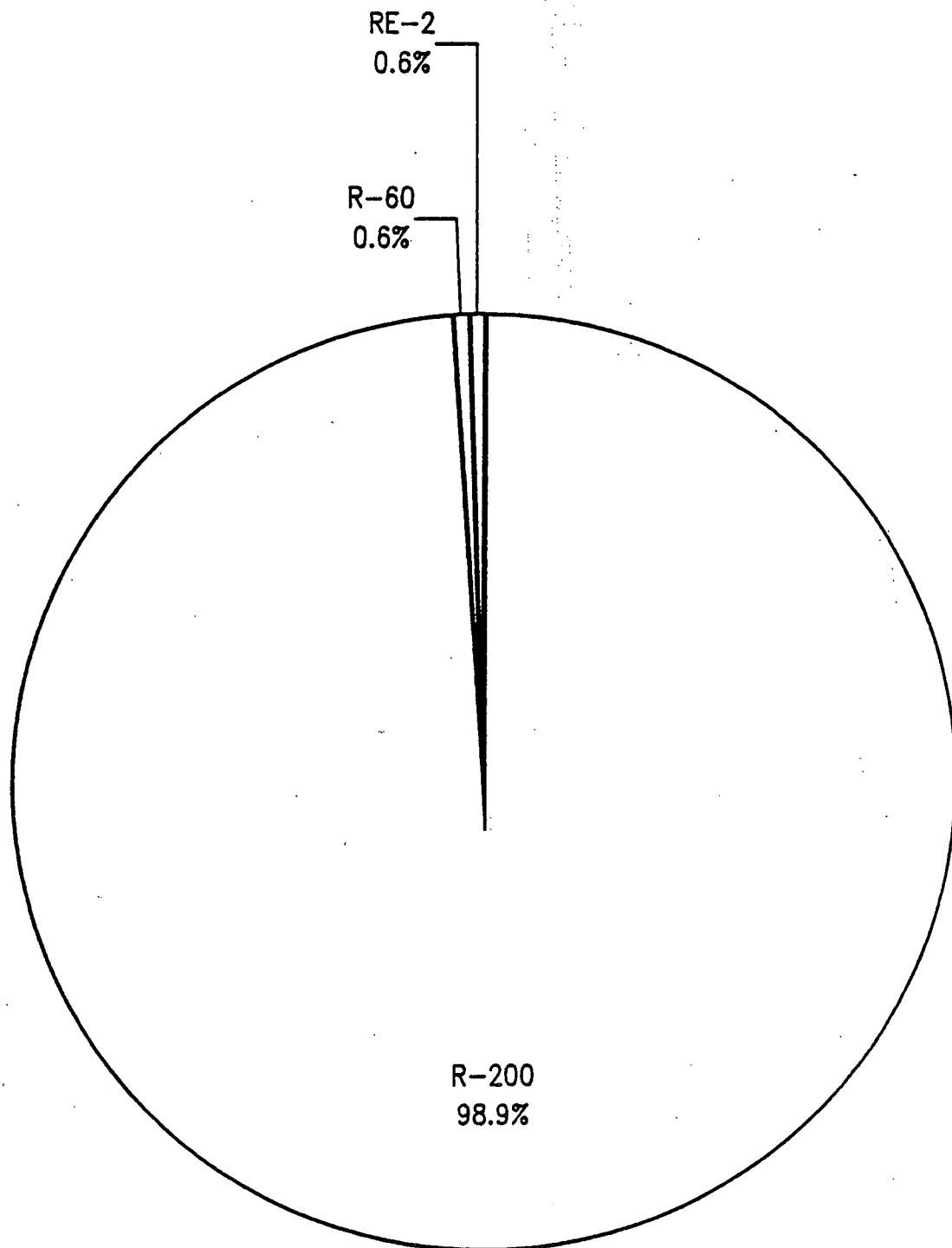


TABLE 11  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
CLOVERLY POLICY AREA, MONTGOMERY COUNTY

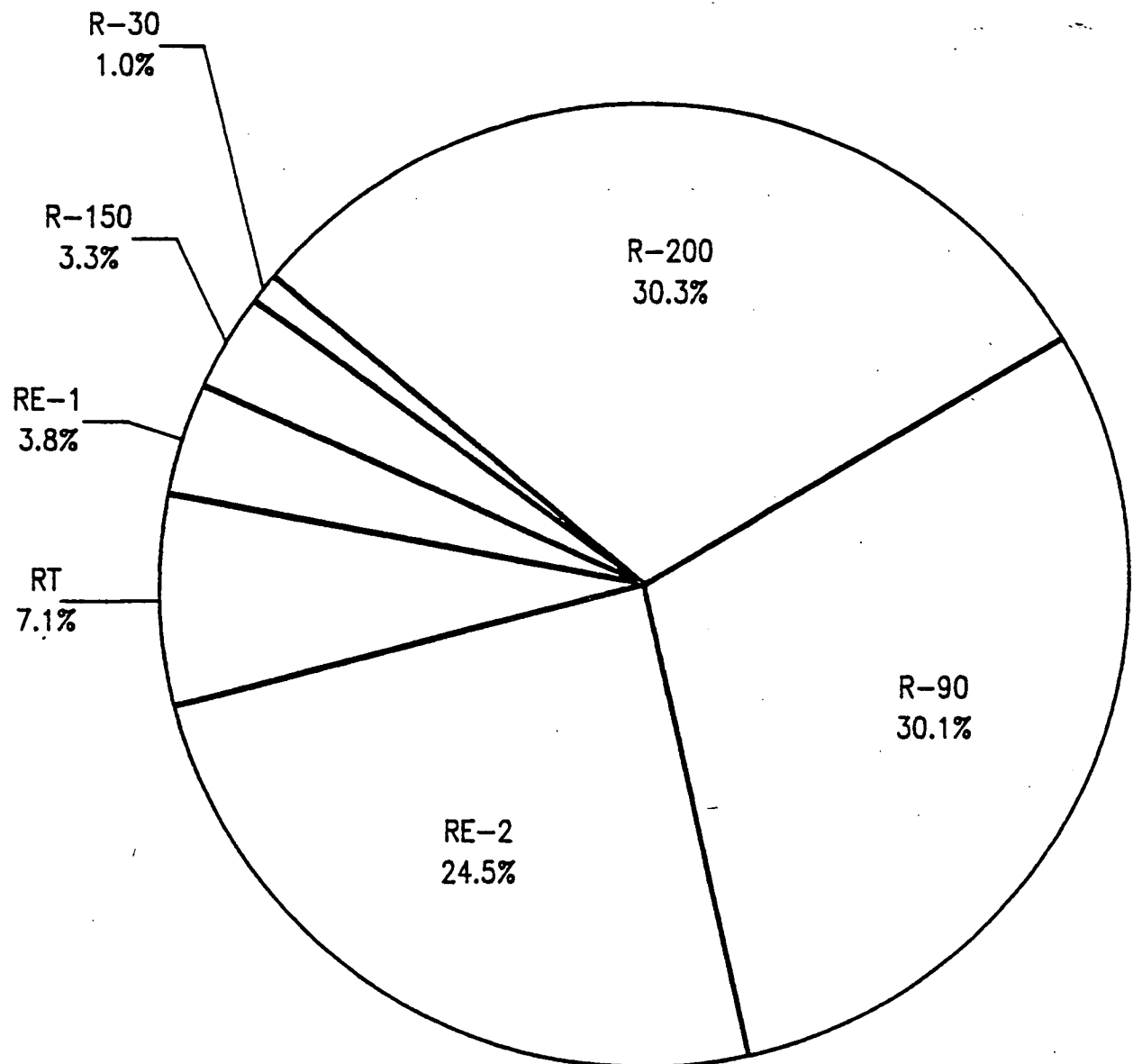
Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	<u>10</u>	<u>16</u>	<u>140</u>	<u>401</u>	<u>220</u>	<u>631</u>	<u>370</u>	<u>1,048</u>
Rural	-	-	-	-	10	53	10	53
RE-2	10	16	140	401	210	578	360	995
<u>MEDIUM LOT</u>	<u>1,790</u>	<u>1,052</u>	<u>1,960</u>	<u>1,204</u>	<u>110</u>	<u>71</u>	<u>3,860</u>	<u>2,327</u>
R-200	1,790	1,052	1,960	1,204	110	71	3,860	2,327
<u>SMALL LOT</u>	<u>10</u>	<u>2</u>	<u>10</u>	<u>2</u>	<u>-</u>	<u>-</u>	<u>20</u>	<u>4</u>
R-90	-	-	10	2	-	-	10	2
R-60	10	2	-	-	-	-	10	2
<u>TOTALS</u>	<u>1,810</u>	<u>1,070</u>	<u>2,110</u>	<u>1,607</u>	<u>330</u>	<u>702</u>	<u>4,250</u>	<u>3,379</u>

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 19: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Potomac Policy Area, Montgomery County



from "Land Supply"  
Nov, 1980

TABLE 12  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
POTOMAC POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	1,120	2,621	500	1,269	1,620	3,890
RE-2	970	2,451	500	1,269	1,470	3,720
RE-1	150	170	-	-	150	170
<u>MEDIUM LOT</u>	1,330	750	460	280	1,790	1,030
R-200	1,200	695	460	280	1,660	975
R-150	130	55	-	-	130	55
<u>SMALL LOT</u>	1,470	406	-	-	1,470	406
R-90	1,190	379	-	-	1,190	379
RT	280	27	-	-	280	27
<u>GARDEN</u>	40	3	-	-	40	3
R-30	40	3	-	-	40	3
<u>TOTALS</u>	3,960	3,780	960	1,549	4,920	5,329

SOURCE: Land Data Bank, MCPB: Special Projects Division.



# CHART 20: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Fairland Policy Area, Montgomery County

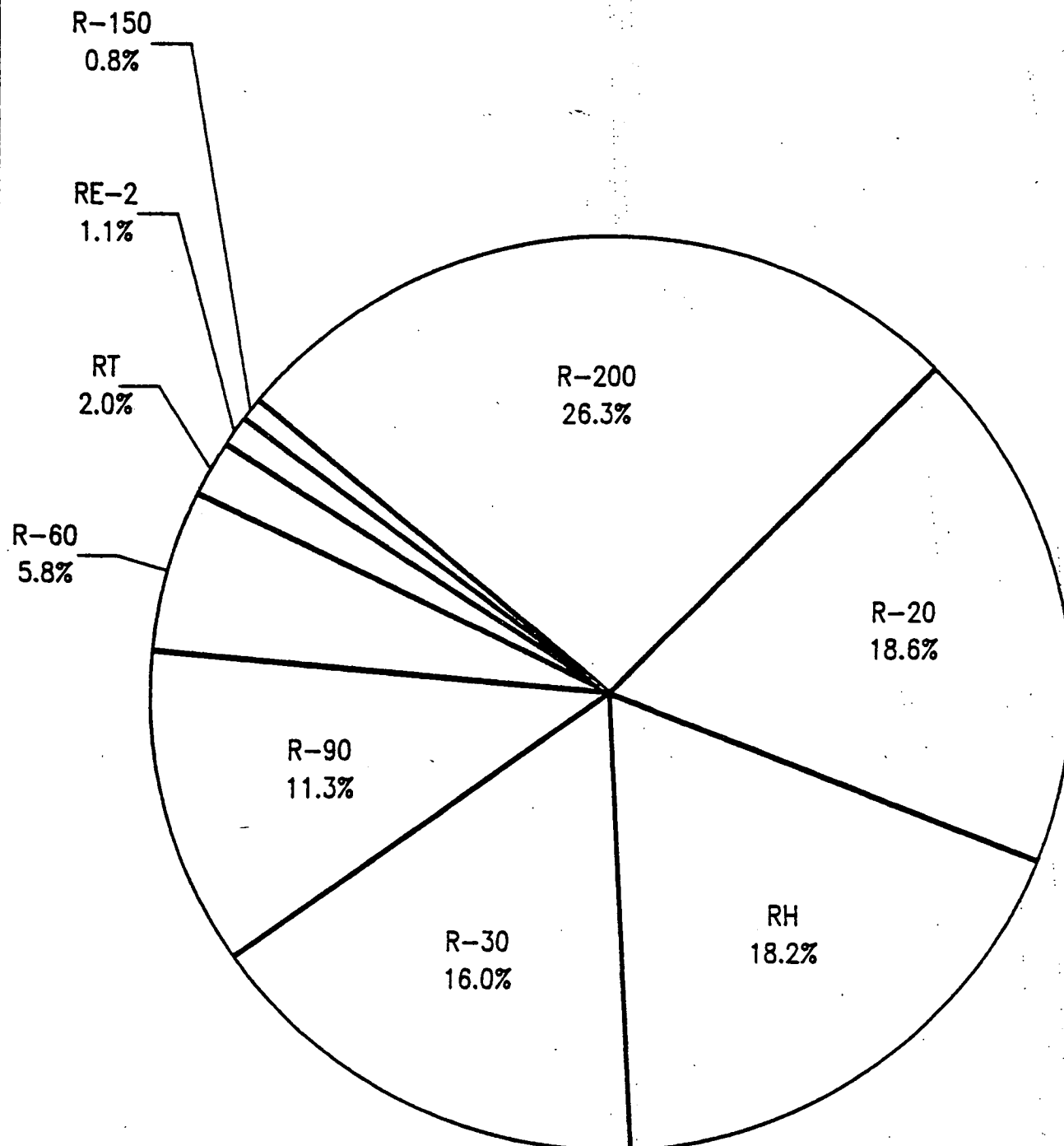


TABLE 13  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
FAIRLAND POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	<u>120</u>	<u>313</u>	<u>190</u>	<u>488</u>	-	-	<u>310</u>	<u>801</u>
RE-2	120	313	190	488	-	-	310	801
<u>MEDIUM LOT</u>	<u>3,010</u>	<u>1,813</u>	<u>300</u>	<u>171</u>	<u>10</u>	<u>5</u>	<u>3,320</u>	<u>1,989</u>
R-200	2,920	1,776	190	124	10	5	3,120	1,905
R-150	90	37	110	47	-	-	200	84
<u>SMALL LOT</u>	<u>2,110</u>	<u>582</u>	-	-	-	-	<u>2,110</u>	<u>582</u>
R-90	1,250	437	-	-	-	-	1,250	437
R-60	640	125	-	-	-	-	640	125
RT	220	20	-	-	-	-	220	20
<u>GARDEN</u>	<u>3,840</u>	<u>244</u>	<u>440</u>	<u>23</u>	-	-	<u>4,280</u>	<u>267</u>
R-30	1,780	132	-	-	-	-	1,780	132
R-20	2,060	112	440	23	-	-	2,500	135
<u>HIGH RISE</u>	<u>2,020</u>	<u>55</u>	<u>610</u>	<u>16</u>	-	-	<u>2,630</u>	<u>71</u>
RH	2,020	55	610	16	-	-	2,630	71
<b>TOTALS</b>	<b>11,100</b>	<b>3,007</b>	<b>1,540</b>	<b>698</b>	<b>10</b>	<b>5</b>	<b>12,650</b>	<b>3,710</b>

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 21: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

I-270 Corridor Policy Areas, Montgomery County

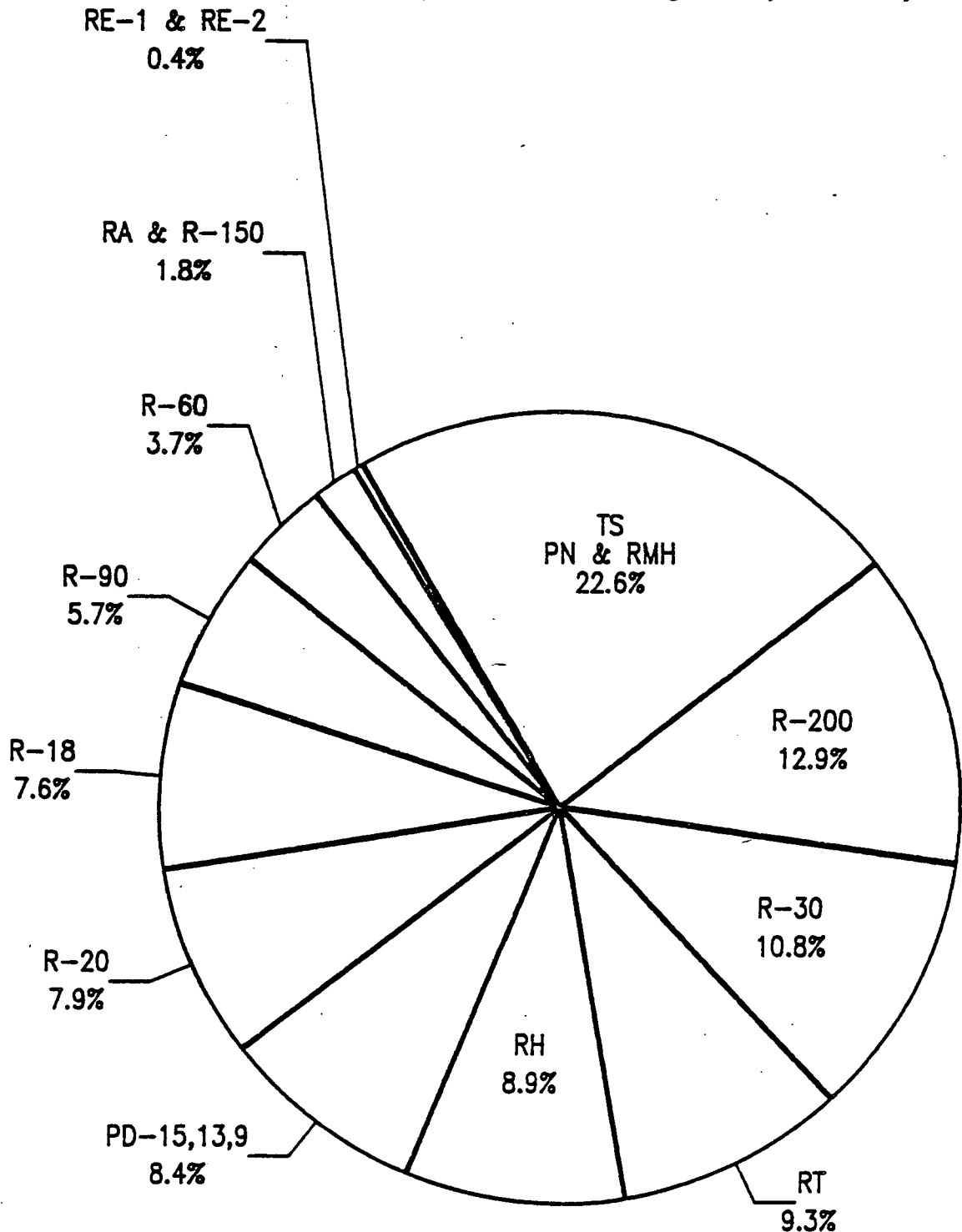


TABLE 14  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORIES  
SUMMARY: I-270 CORRIDOR POLICY AREAS

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
LARGE LOT	200	466	-	-	360	769	560	1,235
RE-2	160	415	-	-	250	641	410	1,056
RE-1	40	51	-	-	110	128	150	179
MEDIUM LOT	7,430	4,276	4,090	2,308	18,040	10,128	29,560	16,712
RA	650	472	-	-	-	-	650	472
R-200	6,510	3,693	3,930	2,240	18,040	10,128	28,480	16,061
R-150	270	111	160	68	-	-	430	179
SMALL LOT	19,410	3,876	1,370	375	30	3	20,810	4,254
R-90	2,890	925	-	-	-	-	2,890	925
R-60	1,850	431	-	-	-	-	1,850	431
RT	4,680	438	420	51	30	3	5,130	492
TS	7,380	1,535	-	-	-	-	7,380	1,535
PN	770	199	950	324	-	-	1,720	523
PD-15	230	15	-	-	-	-	230	15
PD-13	170	13	-	-	-	-	170	13
PD-9	790	221	-	-	-	-	790	221
RMH	650	99	-	-	-	-	650	99
GARDEN	19,100	1,346	440	50	160	32	19,700	1,428
R-30	5,470	405	-	-	-	-	5,470	405
R-20	4,000	227	-	-	160	32	4,160	259
R-18	3,840	259	-	-	-	-	3,840	259
TS	4,070	326	-	-	-	-	4,070	326
PN	370	50	440	50	-	-	810	100
PD-15	230	15	-	-	-	-	230	15
PD-13	180	14	-	-	-	-	180	14
PD-9	940	50	-	-	-	-	940	50
HIGH RISE	4,520	122	-	-	-	-	4,520	122
RH	4,520	122	-	-	-	-	4,520	122
TOTALS	50,660	10,086	5,900	2,733	18,590	10,932	75,150	23,751

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 22: DWELLING UNIT POTENTIAL ON VACANT LAND

SEWERAGE SERVICE CATEGORIES 4&5

Clarksburg Policy Area, Montgomery County

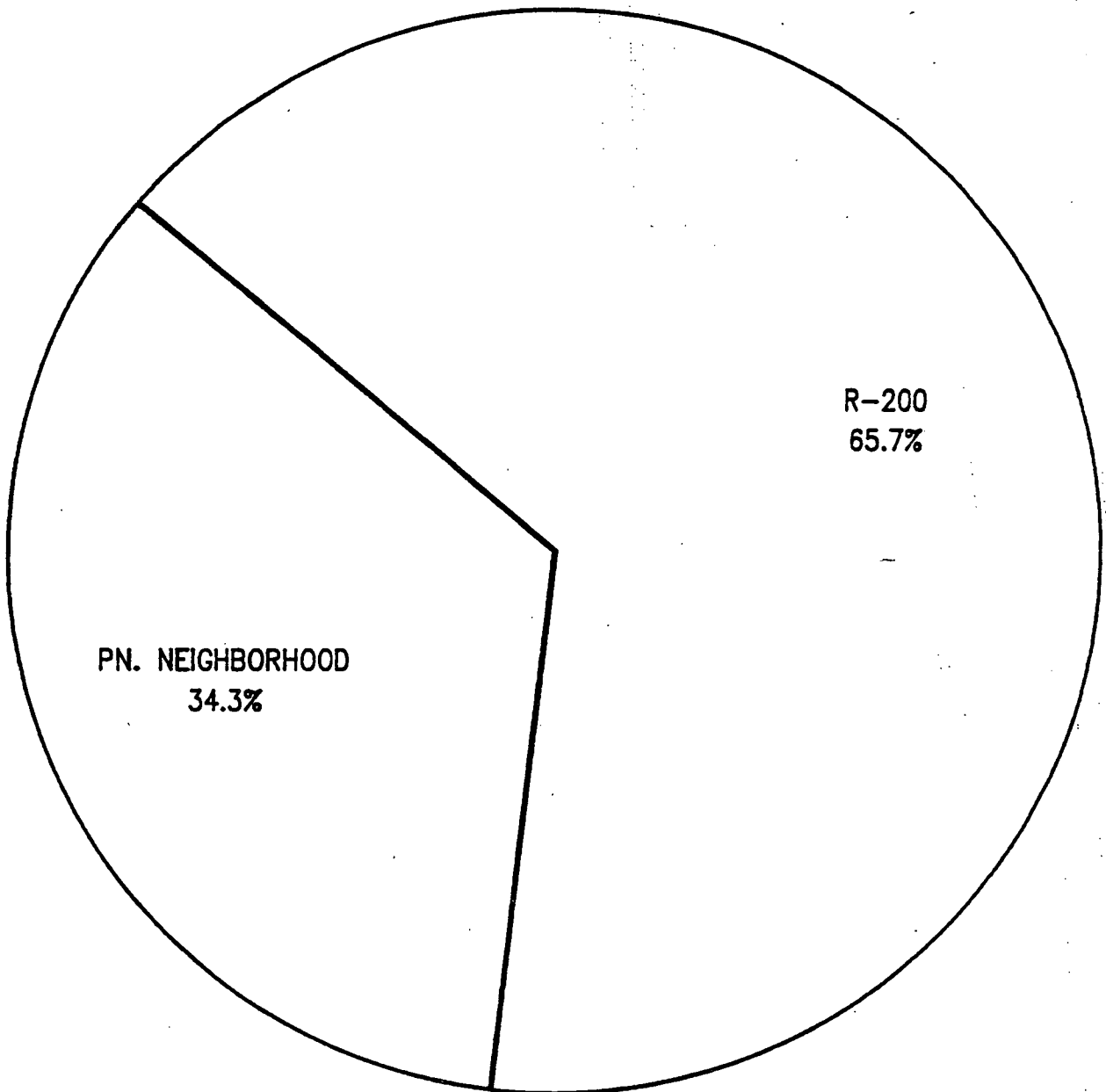


TABLE 15  
 DWELLING UNIT POTENTIAL ON VACANT LAND  
 BY SEWERAGE SERVICE CATEGORY  
 CLARKSBURG POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres
<u>MEDIUM LOT</u>	<u>2,660</u>	<u>1,507</u>	<u>7,080</u>	<u>4,004</u>	<u>9,740</u>	<u>5,511</u>
R-200	2,660	1,507	7,080	4,004	9,740	5,511
<u>SMALL LOT</u>	<u>950</u>	<u>324</u>	<u>-</u>	<u>-</u>	<u>950</u>	<u>324</u>
PN	950	324	-	-	950	324
<u>GARDEN</u>	<u>440</u>	<u>50</u>	<u>-</u>	<u>-</u>	<u>440</u>	<u>50</u>
PN	440	50	-	-	440	50
<u>TOTALS</u>	<u>4,050</u>	<u>1,881</u>	<u>7,080</u>	<u>4,004</u>	<u>11,130</u>	<u>5,885</u>

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 23: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Germantown West Policy Area, Montgomery County

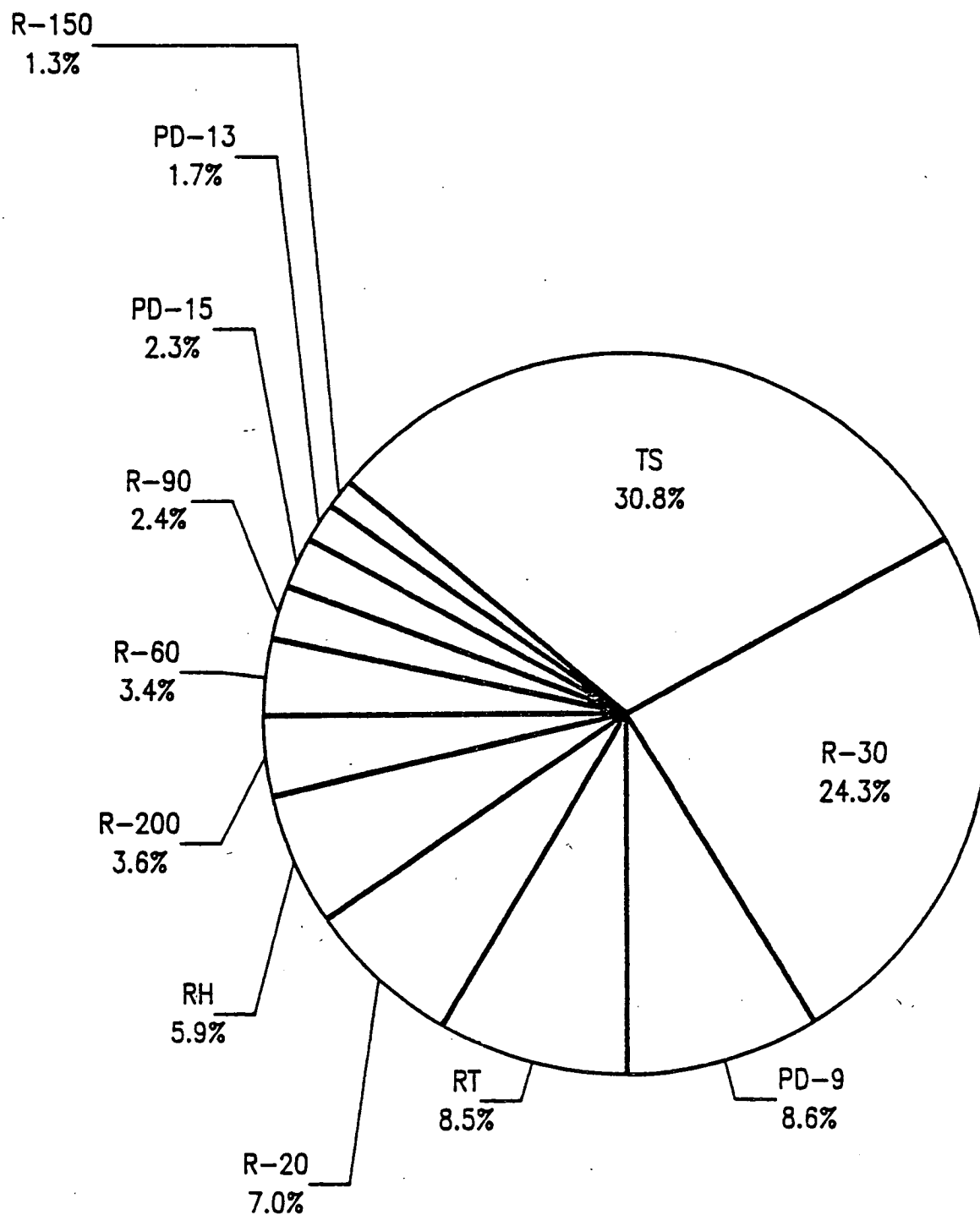


TABLE 16

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY

GERMANTOWN WEST POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	-	-	-	-	130	317	130	317
RE-2	-	-	-	-	130	317	130	317
<u>MEDIUM LOT</u>	990	524	600	317	3,270	1,699	4,860	2,540
R-200	720	413	440	249	3,270	1,699	4,430	2,361
R-150	270	111	160	68	-	-	430	179
<u>SMALL LOT</u>	6,320	1,752	420	51	30	3	6,770	1,806
R-90	480	157	-	-	-	-	480	157
R-60	690	164	-	-	-	-	690	164
RT	1,710	197	420	51	30	3	2,160	251
TS	2,250	985	-	-	-	-	2,250	985
PD-15	230	15	-	-	-	-	230	15
PD-13	170	13	-	-	-	-	170	13
PD-9	790	221	-	-	-	-	790	221
<u>GARDEN</u>	11,540	793	-	-	160	32	11,700	825
R-30	4,870	361	-	-	-	-	4,870	361
R-20	1,400	77	-	-	160	32	1,560	109
TS	3,920	276	-	-	-	-	3,920	276
PD-15	230	15	-	-	-	-	230	15
PD-13	180	14	-	-	-	-	180	14
PD-9	940	50	-	-	-	-	940	50
<u>HIGH RISE</u>	1,190	36	-	-	-	-	1,190	36
RH	1,190	36	-	-	-	-	1,190	36
<u>TOTALS</u>	20,040	3,105	1,020	368	3,590	2,051	24,650	5,524

SOURCE: Land Data Bank, MCPB: Special Projects Division.



# CHART 24: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Germantown East Policy Area, Montgomery County

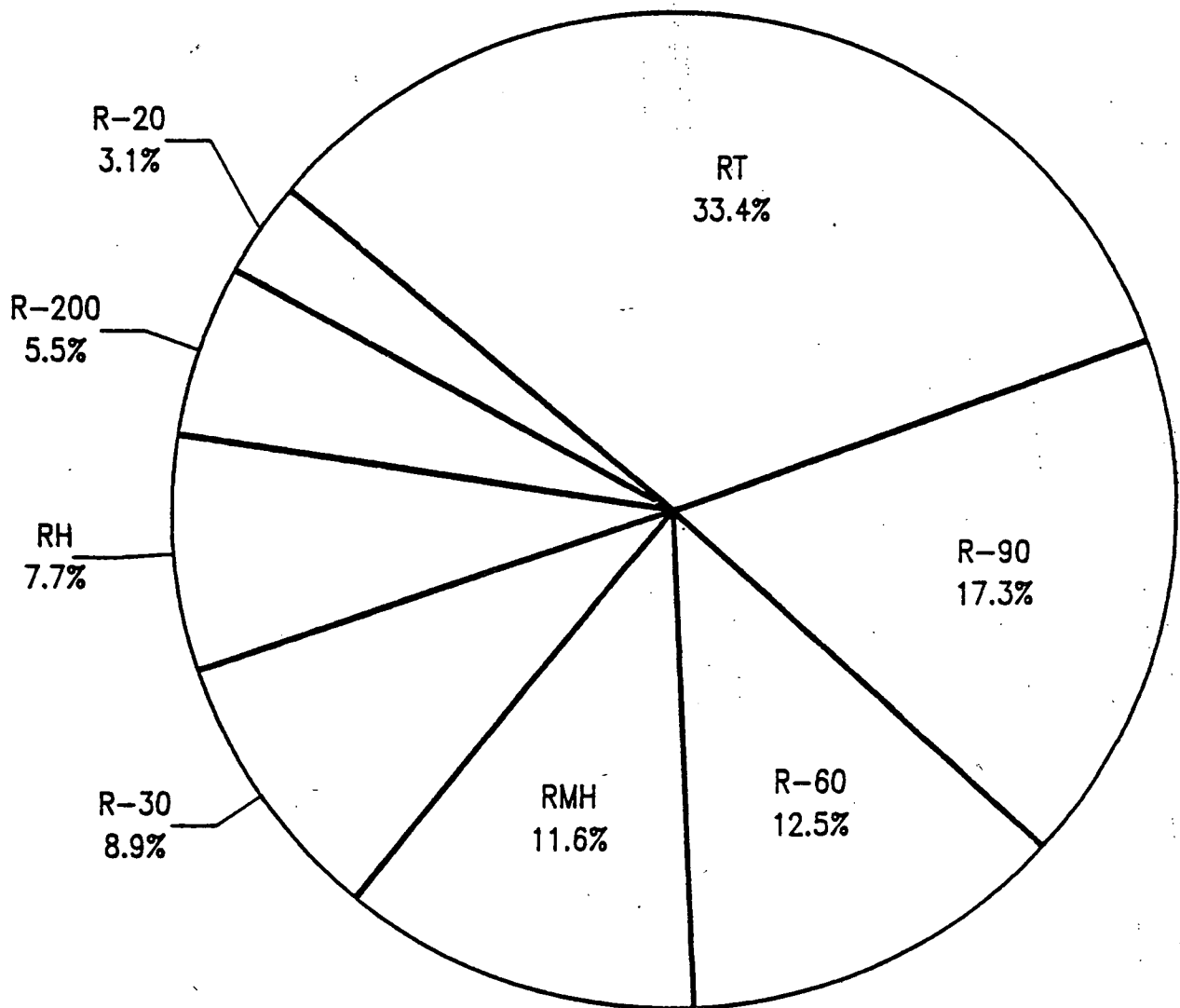


TABLE 17

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY

GERMANTOWN EAST POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	-	-	-	-	60	146	60	146
RE-2	-	-	-	-	60	146	60	146
<u>MEDIUM LOT</u>	310	163	20	13	2,350	1,325	2,680	1,501
R-200	310	163	20	13	2,350	1,325	2,680	1,501
<u>SMALL LOT</u>	4,190	714	-	-	-	-	4,190	714
R-90	970	319	-	-	-	-	970	319
R-60	700	167	-	-	-	-	700	167
RT	1,870	129	-	-	-	-	1,870	129
RMH	650	99	-	-	-	-	650	99
<u>GARDEN</u>	670	46	-	-	-	-	670	46
R-30	500	37	-	-	-	-	500	37
R-20	170	9	-	-	-	-	170	9
<u>HIGH RISE</u>	430	13	-	-	-	-	430	13
RH	430	13	-	-	-	-	430	13
<u>TOTALS</u>	5,600	936	20	13	2,410	1,471	8,030	2,420

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 25: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Gaithersburg Policy Area, Montgomery County

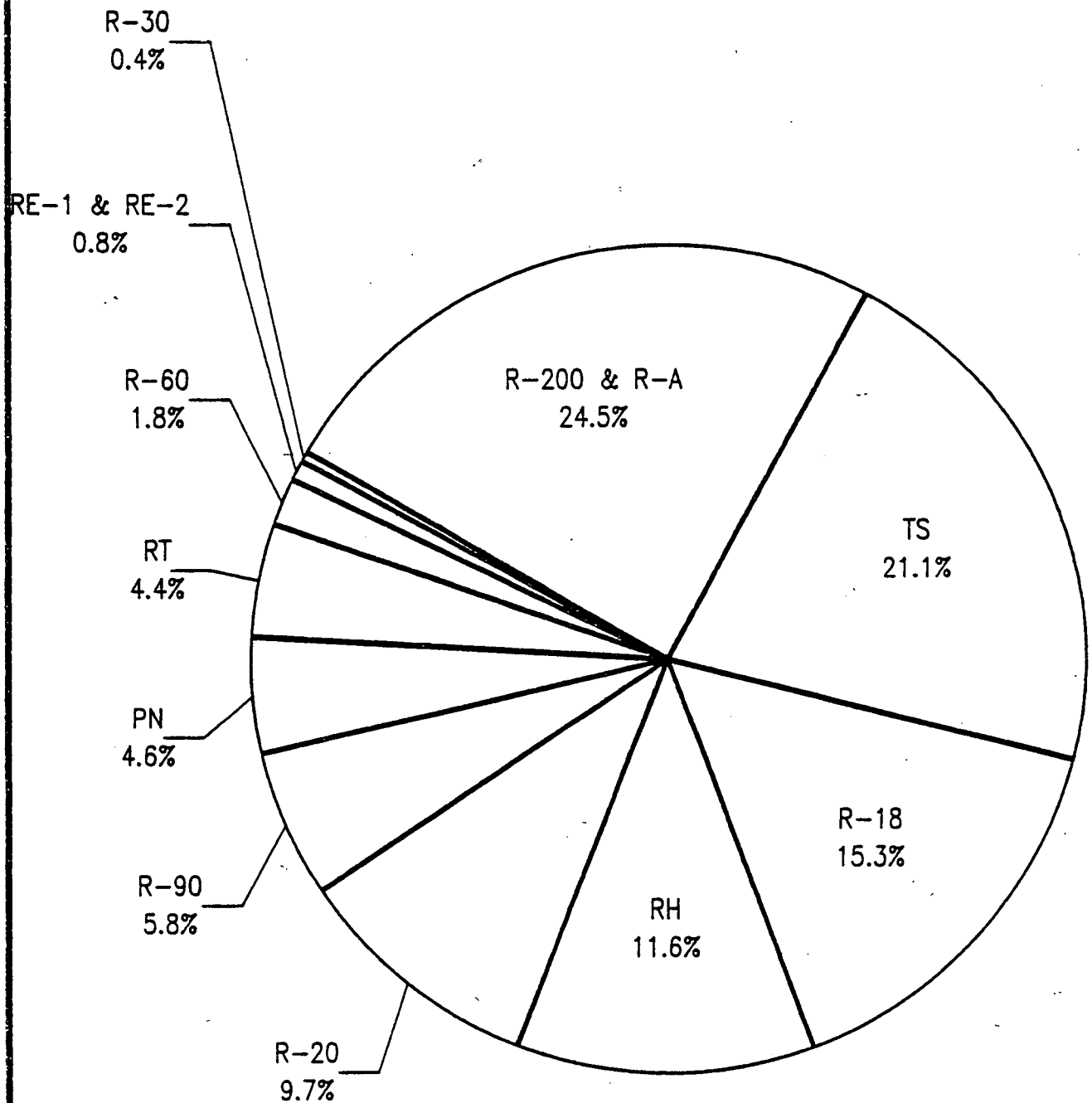


TABLE 18  
DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY  
GAITHERSBURG POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Total	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
LARGE LOT	200	466	-	-	170	306	370	772
RE-2	160	415	-	-	60	178	220	593
RE-1	40	51	-	-	110	128	150	179
MEDIUM LOT	6,130	3,589	810	471	5,340	3,100	12,280	7,160
RA	650	472	-	-	-	-	650	472
R-200	5,480	3,117	810	471	5,340	3,100	11,630	6,688
SMALL LOT	8,900	1,410	-	-	-	-	8,900	1,410
R-90	1,440	449	-	-	-	-	1,440	449
R-60	460	100	-	-	-	-	460	100
RT	1,100	112	-	-	-	-	1,100	112
TS	5,130	550	-	-	-	-	5,130	550
PN	770	199	-	-	-	-	770	199
GARDEN	6,890	507	-	-	-	-	6,890	507
R-30	100	7	-	-	-	-	100	7
R-20	2,430	141	-	-	-	-	2,430	141
R-18	3,840	259	-	-	-	-	3,840	259
TS	150	50	-	-	-	-	150	50
PN	370	50	-	-	-	-	370	50
HIGH RISE	2,900	73	-	-	-	-	2,900	73
RH	2,900	73	-	-	-	-	2,900	73
TOTALS	25,020	6,045	810	471	5,510	3,406	31,340	9,922

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 26: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Suburban Corridor Policy Areas, Montgomery County

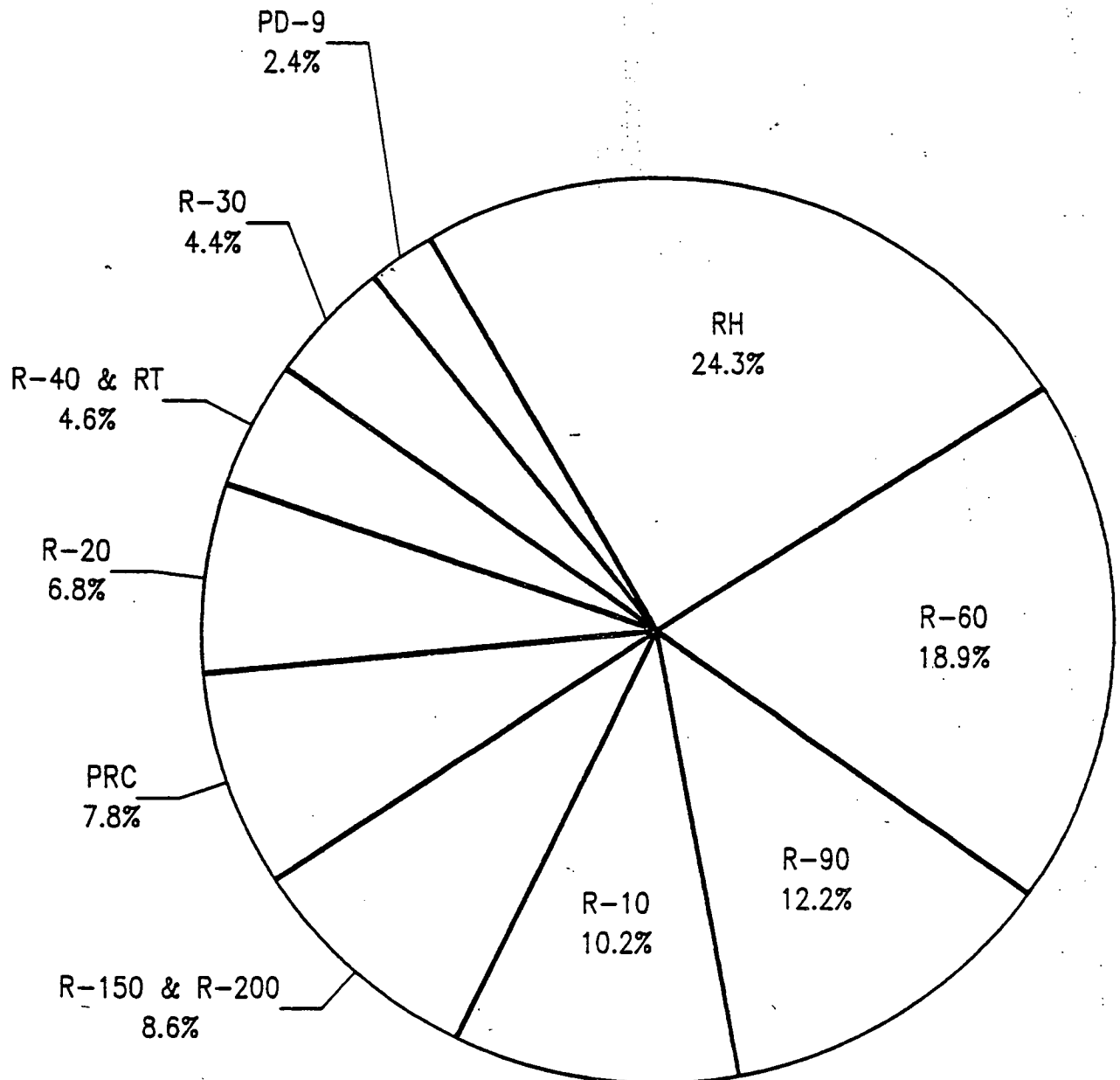


TABLE 19  
 DWELLING UNIT POTENTIAL ON VACANT LAND  
 BY SEWERAGE SERVICE CATEGORIES  
 SUMMARY: SUBURBAN CORRIDOR POLICY AREAS  
 MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Category 6		Totals	
	Units	Acres	Units	Acres	Units	Acres	Units	Acres
LARGE LOT	10	15	20	60	-	-	30	75
RE-2	-	-	20	60	-	-	20	60
RE-1	10	15	-	-	-	-	10	15
MEDIUM LOT	1,810	1,045	200	130	-	-	2,010	1,175
R-200	1,540	932	200	130	-	-	1,740	1,062
R-150	270	113	-	-	-	-	270	113
SMALL LOT	7,540	1,971	1,030	50	-	-	8,570	2,021
R-90	2,580	884	-	-	-	-	2,580	884
R-60	3,990	993	-	-	-	-	3,990	993
R-40	40	6	-	-	-	-	40	6
RT	930	88	-	-	-	-	930	88
PRC	-	-	1,030	50	-	-	1,030	50
GARDEN	4,510	291	1,030	301	-	-	5,540	592
R-30	940	71	-	-	-	-	940	71
R-20	1,430	79	-	-	-	-	1,430	79
PRC	1,640	89	1,030	301	-	-	2,670	390
PD-9	500	52	-	-	-	-	500	52
HIGH RISE	7,290	202	-	-	-	-	7,290	202
RH	5,140	140	-	-	-	-	5,140	140
R-10	2,150	62	-	-	-	-	2,150	62
TOTALS	21,160	3,524	2,280	541	-	-	23,440	4,065

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 27: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Kensington Policy Area, Montgomery County

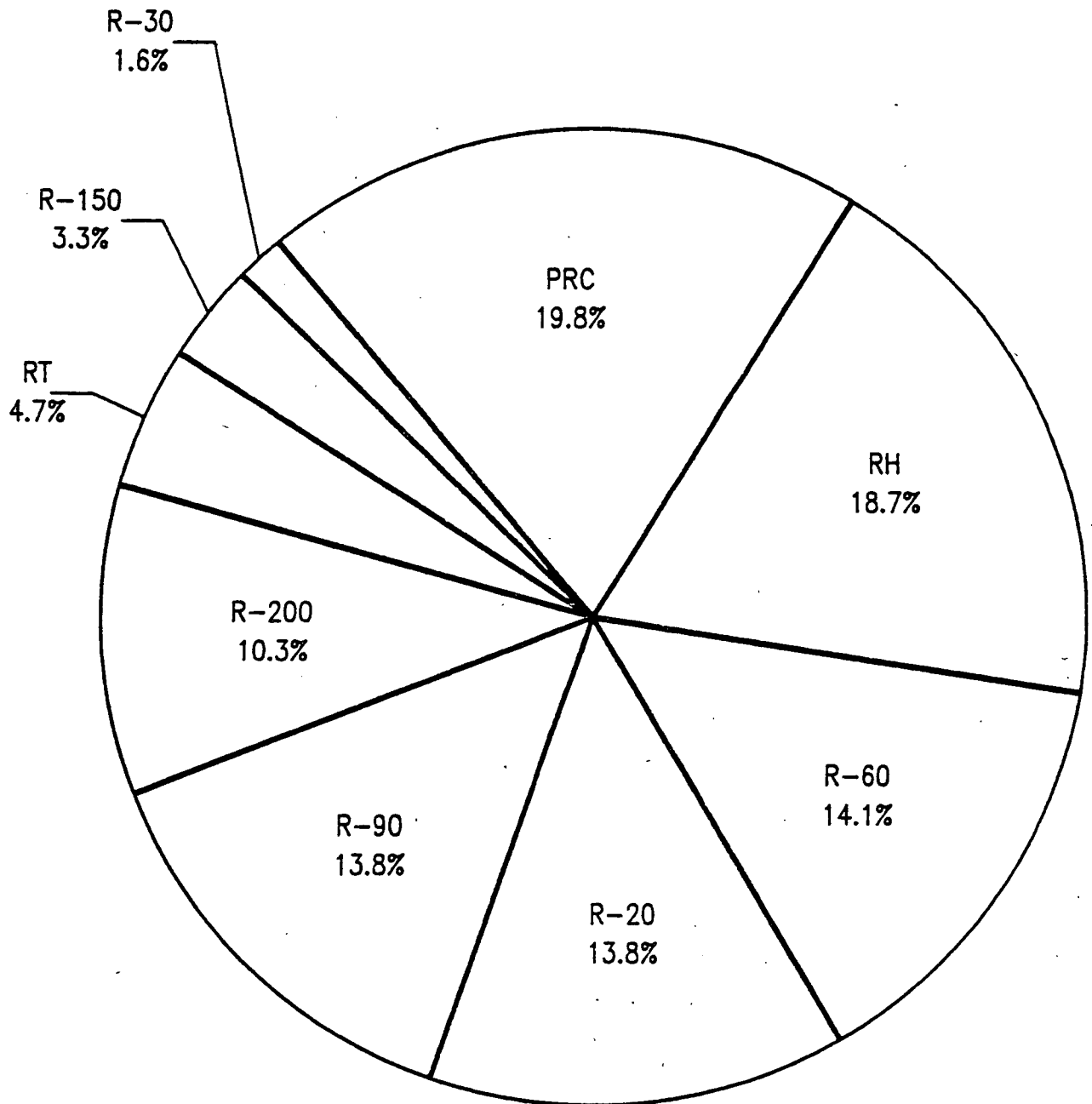


TABLE 20

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY

KENSINGTON POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Categories 4 & 5		Total	
	Units	Acres	Units	Acres	Units	Acres
<u>LARGE LOT</u>	<u>10</u>	<u>15</u>	<u>20</u>	<u>60</u>	<u>30</u>	<u>75</u>
RE-2	-	-	20	60	20	60
RE-1	10	15	-	-	10	15
<u>MEDIUM LOT</u>	<u>1,120</u>	<u>630</u>	<u>200</u>	<u>130</u>	<u>1,320</u>	<u>760</u>
R-200	850	517	200	130	1,050	647
R-150	270	113	-	-	270	113
<u>SMALL LOT</u>	<u>3,200</u>	<u>851</u>	<u>1,030</u>	<u>50</u>	<u>4,230</u>	<u>901</u>
R-90	1,140	397	-	-	1,140	397
R-60	1,670	416	-	-	1,670	416
RT	390	38	-	-	390	38
PRC	-	-	1,030	50	1,030	50
<u>GARDEN</u>	<u>2,910</u>	<u>161</u>	<u>1,030</u>	<u>301</u>	<u>3,940</u>	<u>462</u>
R-30	130	9	-	-	130	9
R-20	1,140	63	-	-	1,140	63
PRC	1,640	89	1,030	301	2,670	390
<u>HIGH RISE</u>	<u>1,550</u>	<u>42</u>	<u>-</u>	<u>-</u>	<u>1,550</u>	<u>42</u>
RH	1,550	42	-	-	1,550	42
<u>TOTALS</u>	<u>8,790</u>	<u>1,699</u>	<u>2,280</u>	<u>541</u>	<u>11,070</u>	<u>2,240</u>

SOURCE: Land Data Bank, MCPB: Special Projects Division.



# CHART 28: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Silver Spring Policy Area, Montgomery County

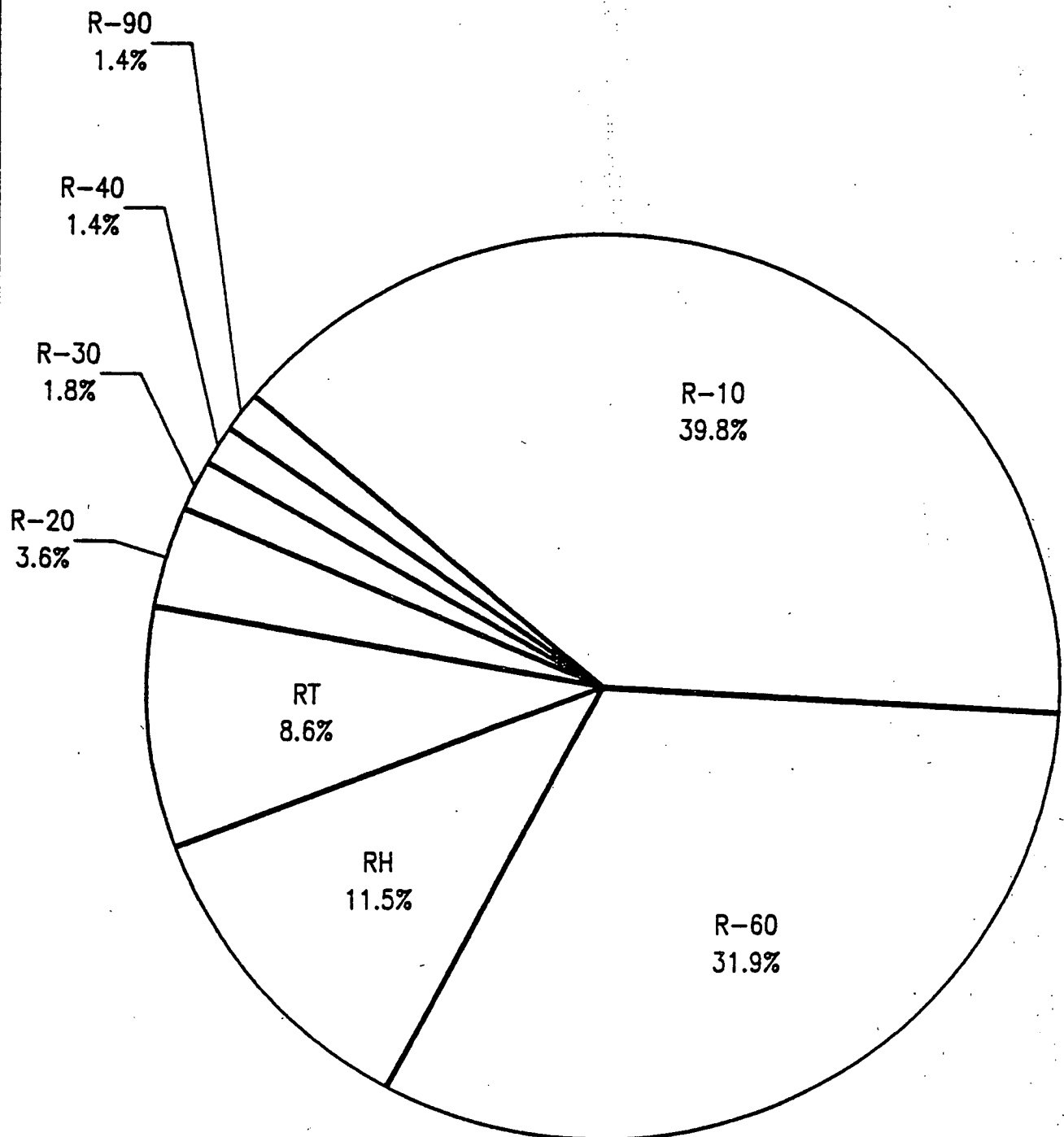


TABLE 21  
 DWELLING UNIT POTENTIAL ON VACANT LAND  
 BY SEWERAGE SERVICE CATEGORY  
 SILVER SPRING POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Total	
	Units	Acres	Units	Acres
<u>SMALL LOT</u> - - - -	<u>1,210</u>	<u>271</u>	<u>1,210</u>	<u>271</u>
R-90	40	14	40	14
R-60	890	228	890	228
R-40	40	6	40	6
RT	240	23	240	23
<u>GARDEN</u> - - - -	<u>150</u>	<u>11</u>	<u>150</u>	<u>11</u>
R-30	50	5	50	5
R-20	100	6	100	6
<u>HIGH RISE</u> - - - -	<u>1,430</u>	<u>42</u>	<u>1,430</u>	<u>42</u>
RH	320	9	320	9
R-10	1,110	33	1,110	33
<u>TOTALS</u>	<u>2,790</u>	<u>324</u>	<u>2,790</u>	<u>324</u>

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 29: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

North Bethesda Policy Area, Montgomery County

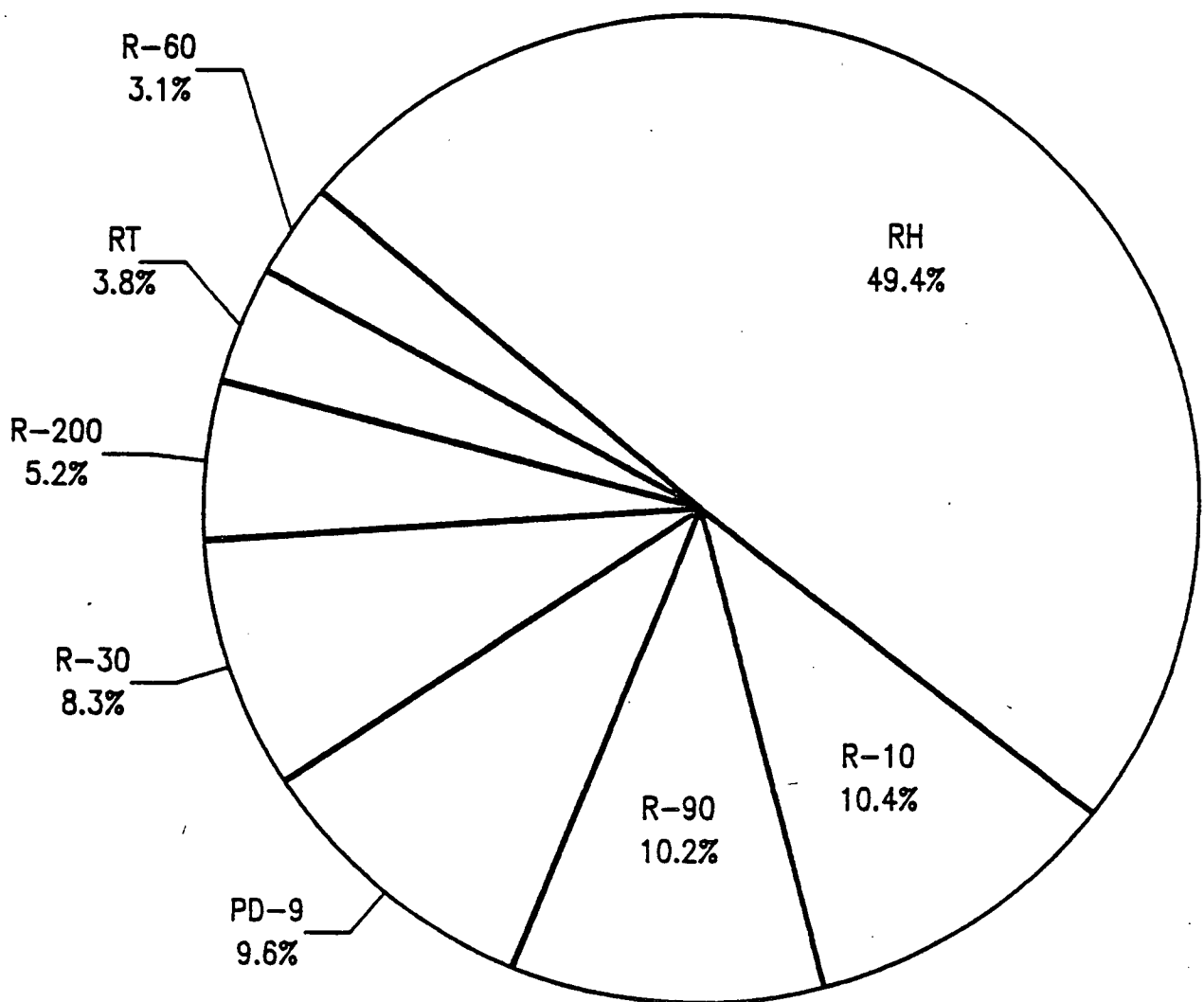


TABLE 22

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWERAGE SERVICE CATEGORY

NORTH BETHESDA POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Total	
	Units	Acres	Units	Acres
<u>MEDIUM LOT</u>	<u>270</u>	<u>156</u>	<u>270</u>	<u>156</u>
R-200	270	156	270	156
<u>SMALL LOT</u>	<u>890</u>	<u>226</u>	<u>890</u>	<u>226</u>
R-90	530	162	530	162
R-60	160	46	160	46
RT	200	18	200	18
<u>GARDEN</u>	<u>930</u>	<u>84</u>	<u>930</u>	<u>84</u>
R-30	430	32	430	32
PD-9	500	52	500	52
<u>HIGH RISE</u>	<u>3,110</u>	<u>84</u>	<u>3,110</u>	<u>84</u>
RH	2,570	70	2,570	70
R-10	540	14	540	14
<u>TOTALS</u>	<u>5,200</u>	<u>550</u>	<u>5,200</u>	<u>550</u>

SOURCE: Land Data Bank, MCPB: Special Projects Division.

# CHART 30: DWELLING UNIT POTENTIAL ON VACANT LAND

## SEWERAGE SERVICE CATEGORIES 1-3

Bethesda Policy Area, Montgomery County

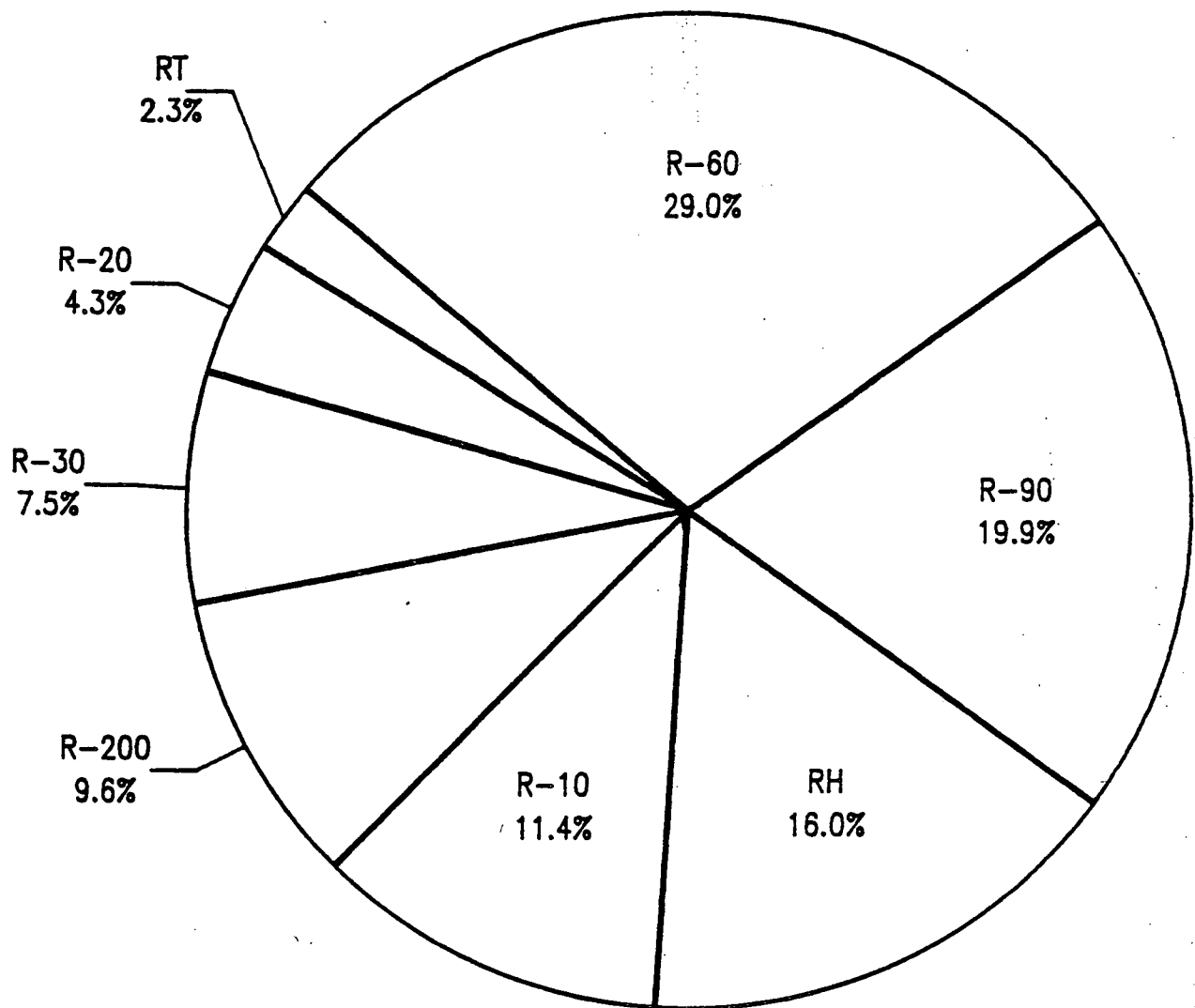


TABLE 23  
 DWELLING UNIT POTENTIAL ON VACANT LAND  
 BY SEWERAGE SERVICE CATEGORY  
 BETHESDA POLICY AREA, MONTGOMERY COUNTY

Zoning By Structure Type	Categories 1-3		Total	
	Units	Acres	Units	Acres
<u>MEDIUM LOT</u>	<u>420</u>	<u>259</u>	<u>420</u>	<u>259</u>
R-200	420	259	420	259
<u>SMALL LOT</u>	<u>2,240</u>	<u>623</u>	<u>2,240</u>	<u>623</u>
R-90	870	311	870	311
R-60	1,270	303	1,270	303
RT	100	9	100	9
<u>GARDEN</u>	<u>520</u>	<u>35</u>	<u>520</u>	<u>35</u>
R-30	330	25	330	25
R-20	190	10	190	10
<u>HIGH RISE</u>	<u>1,200</u>	<u>34</u>	<u>1,200</u>	<u>34</u>
RH	700	19	700	19
R-10	500	15	500	15
<u>TOTALS</u>	<u>4,380</u>	<u>951</u>	<u>4,380</u>	<u>951</u>

SOURCE: Land Data Bank, MCPB: Special Projects Division.

## APPENDIX

### Methodology

The information tabulated in the following tables is extracted from the Montgomery County Planning Board's Land Data Bank System. An extensive effort to develop this system was begun in 1977 when the initial output was presented in the Fourth Annual Growth Policy Report--Carrying Capacity and Adequate Public Facilities. The land use information, which can be retrieved from the system, is an important component of the Planning Board's integrated growth management accounting system. The objective is to efficiently report data, on a timely basis, in both tabular and graphic formats. The development of this automated system has been hampered by inaccuracies found in the County's Land Assessment Parcel File's assignment of zoning codes and errors, in the assignment of the system's basic geographic unit, the Census Tract Block (CTB). The Montgomery County Planning Board is attempting to reduce these problems by using a system of computer programs and clerical effort to copy, verify, and update the basic data on the Parcel File and transfer this information into a computerized Land Data Bank.

The basic inputs to the residential zoning supply element of the Land Data Bank System include a definition of vacant land, the assessor's Parcel File, estimated dwelling unit yields per acre for each residential zone, current developer land use plans for planned community zones (TS, PD, PRC, PN), the current housing unit inventory, and estimated redevelopment capacity for Transit Station Areas (TSA) and Central Business District Areas (CBD). The inputs to the system are explained below.

### Parcel File Extract

The creation of the Vacant Land Data Bank is the result of three separate computer programs. The initial program creates an extract file of the Montgomery County Parcel File. Technically speaking, this results in the creation of a record which is approximately 75 percent shorter than the Parcel File (93 bytes long as compared with the original 390 byte LDB record). The record then consists of the following information.

- |   |                                     |
|---|-------------------------------------|
| 1. District and Subdivision                         | 11. Property Class Code             |
| 2. Tax Account Number                               | 12. <u>Land Use Code</u>            |
| 3. Owners Last Name (1st ten bytes)                 | 13. Assessor's Code                 |
| 4. Acres/Feet                                       | *14. <u>Vacant Land Definition</u>  |
| 5. Acres-Feet Code (indicates either acres or feet) | 15. <u>Zone</u>                     |
| 6. Tax-Class  | 16. <u>Zoning Indicator</u>         |
| 7. Land Assessment                                  | 17. <u>Stories</u>                  |
| 8. Improvement Assessment                           | 18. <u>Gross Floor Area</u>         |
| 9. Taxable Land                                     | 19. <u>Dwelling Units</u>           |
| 10. Taxable Improvements                            | 20. <u>Census Tract/Block (CTB)</u> |

The items which are underlined are updated and verified through a combination of computer verification programs and clerical effort. The other items are accepted as they appear on the file.

The \*Vacant Land Definition is assigned in the following manner:

1. Parcels with zero improvement value
2. Farm assessed land
3. Partially vacant (or redevelopable) parcels with land value greater than improvement value.

In the system, the term "vacant" refers to the sum of the above but excludes: public land, all private land having tax exempt status which is used for cultural and recreational purposes, and other private recreational land such as country clubs and common open space. This is the definition used to define the vacant land supply which is described in this report.

The second program adds geographical locators to the extracted file by matching the CTB's on the extract file to that of the conversion file. The fields now added to the file are:

- |                   |                   |
|-------------------|-------------------|
| 1. Planning Area  | 4. Drainage Basin |
| 2. Sewer Category | 5. Policy Area    |
| 3. Traffic Zone   |                   |

The third program assigns major land use categories to the extract file. The non-residential categories will be the subject of future land supply reports.

- |                                 |                        |
|---------------------------------|------------------------|
| 1. Low Density Single Family    | 8. Commercial - Office |
| 2. Medium Density Single Family | 9. Local Government    |
| 3. High Density Single Family   | 10. Private Facilities |
| 4. Low Density Multi-Family     | 11. Agricultural       |
| 5. High Density Multi-Family    | 12. Government Park    |
| 6. Industrial                   | 13. Park Private       |
| 7. Commercial - General         |                        |

To calculate potential dwelling units involves many data arrays, the major array is the zoning category. Every residential zone has both a maximum yield of dwelling units per acre and an effective yield (that which builders actually can build on). Although some zones may be the same for jurisdictions such as Rockville and Gaithersburg, the maximum and effective yields are different. Therefore, for those jurisdictions separate arrays are used.

<u>Zone</u>	<u>Maximum Yield/AC</u>	<u>Effective Yield/AC</u>
RDTZ	0.04	0.04
RUR	0.20	0.18
RE-2	0.40	0.40
RE-2C	0.40	0.40
RE-1	1.00	0.90
R-200	2.00	1.64
R-150	2.60	2.20
R-150C	2.60	2.40
R-90	3.60	2.90
R-60	5.00	4.20
R-40	8.70	8.50
RT	12.50	10.00
R-30	14.50	12.25
R-20	21.70	16.76
R-10	43.50	33.16
RH	43.50	33.16
TSR	150.00	80.00



<u>Zone</u>	<u>Maximum Yield/AC</u>	<u>Effective Yield/AC</u>
TSM	150.00	80.00
RCBD	290.00	232.00
ROBD	290.00	232.00
PRC	10.00	10.00
RMH	7.00	6.50
RT-6	6.00	5.60
RT-8	8.00	7.50
RT-10	10.00	9.40
RT-12	12.00	11.80
RC	0.20	0.20
TRO-1	2.00	2.00
TRO-2	2.00	2.00
RDTZ	0.04	0.04

As a vacant land parcel is read into the program, the zoning field is checked to make sure it is both valid and that it is used in the correct array. Once the correct array is located, the computer program reads the acreage field and multiplies the acreage by its yield factor. If its answer is less than 1 (one), no potential dwelling unit will be given. Recorded lots outside of the sewerage service envelope must be at least 2 acres in order to have a dwelling unit yield of one or greater. Since the yields for the planned community zones (TS, PD, PN, PRC) cannot be computed outright, they are inputted directly into the system.

If its dwelling unit count is greater than 55, an MPDU bonus of 11 percent is given to land in zones which grant a bonus. Empirical data shows that the average effective MPDU bonus is 11 percent.

Computer printouts are produced by geographic areas by sewerage service categories for the various land types:

For Geographic Area:

1. Sewer Service Category
2. Planning Area
3. Full County
4. Traffic Zone
5. Policy Area

For Land Types:

1. Vacant
2. Redevelopable
3. Committed
4. All Types
5. Vacant and Redevelopable

For Zones:

1. Only Residential
2. All Zones

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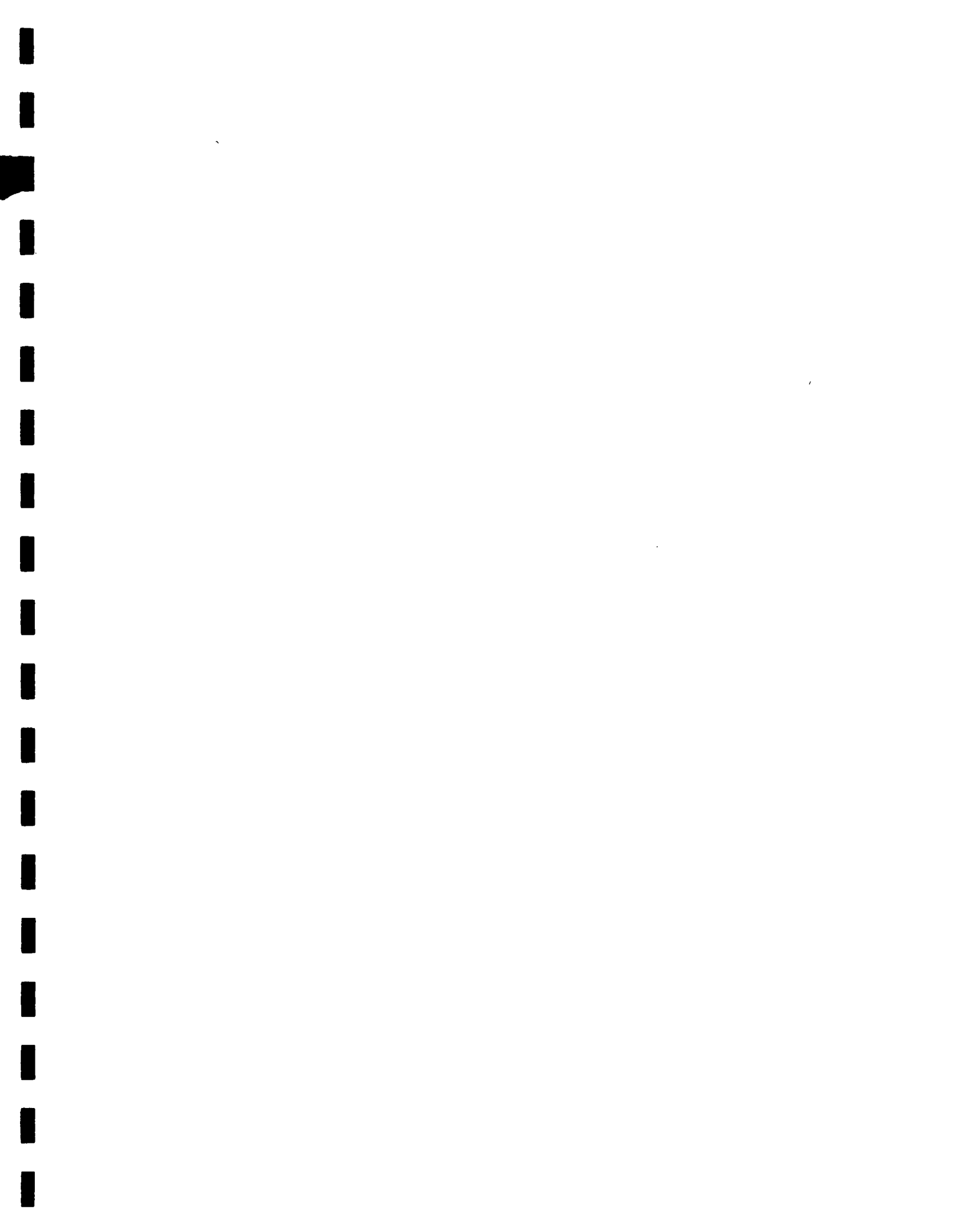
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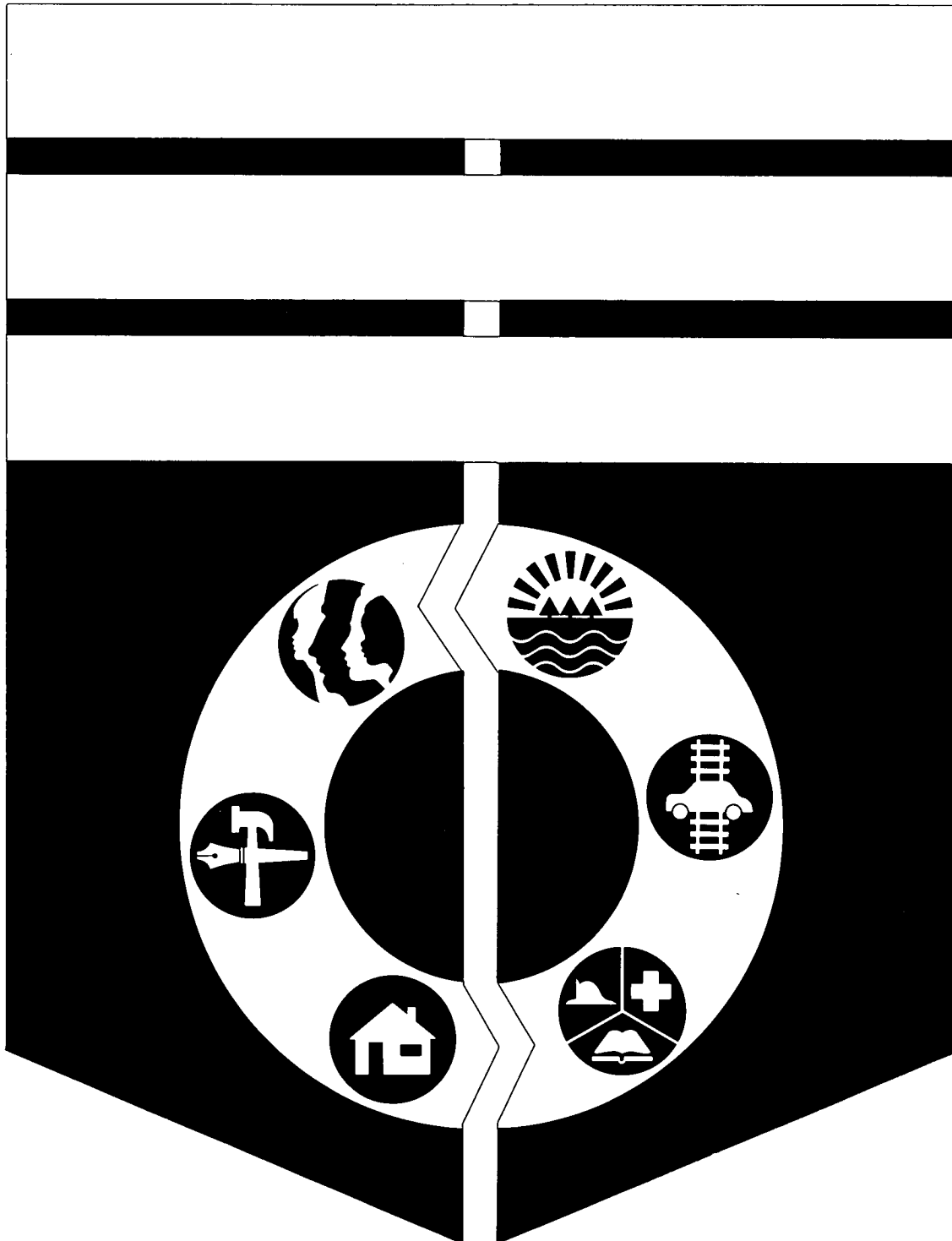
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# LAND DEMAND



LAND  
DEMAND

SIXTH  
GROWTH  
POLICY  
REPORT

of the

MONTGOMERY COUNTY  
PLANNING BOARD

NOVEMBER 1980

THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

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## THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

The Maryland-National Capital Park and Planning Commission is a bi-county agency created by the General Assembly of Maryland in 1927. The Commission's geographic authority extends to the great majority of Montgomery and Prince George's Counties: the Maryland-Washington Regional District (M-NCPPC planning jurisdiction) comprises 1,001 square miles, while the Metropolitan District (parks) comprises 919 square miles, in the two counties.

The Commission has three major functions:

- (1) the preparation, adoption, and from time to time amendment or extension of the General Plan for the physical development of the Maryland-Washington Regional District;
- (2) the acquisition, development, operation, and maintenance of a public park system; and
- (3) in Prince George's County only, the operation of the entire County public recreation program.

The Commission operates in each county through a Planning Board appointed by and responsible to the County Government. All local plans, recommendations on zoning amendments, administration of subdivision regulations, and general administration of parks are responsibilities of the Planning Boards.

**TITLE:** LAND SUPPLY AND DEMAND, Sixth Growth Policy Report of the Montgomery County Planning Board

**AUTHOR:** The Montgomery County Planning Board of The Maryland-National Capital Park and Planning Commission

**SUBJECT:** A detailed inventory of supply of residential land which is available for development and an illustrative scenario of the County's population and housing growth for the 1980's.

**DATE:** November 1980

**PLANNING AGENCY:** The Montgomery County Planning Board of The Maryland-National Capital Park and Planning Commission

**SOURCE OF COPIES:** The Maryland-National Capital Park and Planning Commission, 8787 Georgia Avenue, Silver Spring, Maryland 20907

**SERIES NUMBER:**

**NUMBER OF PAGES:** 16

**ABSTRACT:** This document includes two reports. The Supply report presents a detailed inventory of Montgomery County's residential land which is available for development. The Demand report is designed to foster a discussion of illustrative scenarios for Montgomery County's population and housing growth for the 1980's given changes in trends indicated by recent census data and a slower-paced economic outlook.



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# INTRODUCTION

Every two years, the Planning Board undertakes an assessment of its growth forecasts. The staff is now in the first stage of a reassessment and believes that a major reduction may be required from the current forecasts.

There are several basic reasons for reducing the forecasts at this time. The recent volatility of long-term interest rate is indicative of a major change of perception within the financial community. Speculation on the future rate of inflation will continue to keep mortgage rates high. The cost of housing is outstripping the rise of incomes and should deter entry into the housing market. The preliminary estimates of the 1980 Census indicate that the number of people per household has been decreasing faster than anticipated. As a County, we have gone from a 1970 situation of being significantly above the nation's average of people per household (3.33 for Montgomery County and 3.14 for the nation), to a point where, in 1980, the average for the County and the nation is essentially the same (2.76).

Despite the lack of the full detail of the 1980 Census, it is necessary to go forward with the staff's forecast assessment effort and produce illustrative scenarios. The Board of Education is undertaking, with our assistance, a Long Range (15 year) Facility Needs Plan. This study is tied to a Statewide program that has an immediate need for projections of school age population. The Washington Council of Governments is beginning a third round of a Cooperative Forecasting Process which, when completed, will lead to revisions to the Planning Board's official forecasts. This scenario work is the first step in that process for Montgomery County. It is expected that this report will help establish a discussion within Montgomery County concerning the County's forecasts and that this will lead to a better set of revised forecasts.

This document contains two basic forecast scenarios and two alternatives for these basic scenarios. They represent an illustrative attempt to bound the range of uncertainty of the County's future growth and are not yet official forecasts of the Montgomery County Planning Board. They represent our assessment of realistic development activity which the market is likely to produce and is not our assessment of a desirable growth rate. Public policy may operate to increase or decrease the assumed development activity. However, the scenarios are offered as guidance to the Board of Education study. The Demographic Forecasting Model used to produce these scenario forecasts is able to test alternative assumptions. The model is open to speculation on future construction, birth, and turnover rates, as well as the average household size of new residents. We anticipate and welcome many more model runs to accommodate user suggestions for altering these key forecast variables.

Every forecast user has an obligation to acknowledge the range of uncertainty in the County's future. This obligation can be met by analyzing the risks involved in using a scenario which will ultimately underestimate County growth as against the cost of providing for future growth which may never materialize.

The following material explains the basic working details of the Demographic Forecasting Model. The key forecasting variables are delineated and examined. The basic forecasts and alternatives are described in terms of the economic and social future they envision. The scenario's numeric input and output are displayed for further discussion.

# DEMOGRAPHIC FORECAST MODEL CONCEPTS

Today, forecasts of economic activity developed from econometric models vary widely. They depend on the forecaster's perception of future events and the weight or significance attached to each event (e.g., energy shortages, inflation, etc.). Although economic trends are believed to influence population and household growth, the techniques for utilizing economic conditions to reflect or predict future demographic trends have not been empirically verified. Although the Demographic Model of the Montgomery County Planning Board does not make explicit assumptions about possible future economic developments and their impact on household growth, it does reflect these factors implicitly.

Charting future events from available demographic information is somewhat clearer. The Demographic Forecast Model is a computer program developed by the staff which attempts to mathematically simulate changes in Montgomery County's population. The model has a logical structure which attempts to mimic the dynamics of births, deaths, mobility, household formation and new housing construction as they relate to the County's population. For purposes of discussion, the model may be simplified into two parts; natural increase, and elements of social change.

The natural increase portion of the model examines the age/sex distribution of the population. The population is aged. This is the one inevitable event in the entire modeling process. Women in childbearing age groups give birth at a rate determined by their age. These birth rates can easily be altered by the scenario builder. Death rates are then applied to the population to calculate the expected survived resident population.

Certainly not everyone in the County will still be here five years from now. Some will move outside the County and vacate their units. These events can be

expressed as a turnover or mobility rate. Turnover may occur for any number of economic or sociological reasons. These rates are variable at the discretion of the model user. The starting point, once again, is the most current empirical data.

New housing construction is a direct input to the model. It is a variable also dependent upon complex economic and social factors. The model is sensitive to two different types of dwelling units, single family and multi-family.

The sum of units left vacant from mobility plus the new units constructed are then occupied by "new residents." These new residents are often referred to as in-migrants. The profile of these in-migrants have been determined empirically but the analyst is free to speculate on future alterations.

The sum of the future resident (non-mover) population plus the future new in-migration population will equal the total future population in the succeeding time period.

Scenario building occurs in the adjustment of four key variables; birth and mobility rates, the household size of in-migrants as well as the amount and type of new construction. Although the actual adjustment is mechanical in nature, these key factors are the end result of complex socioeconomic interaction. The art of scenario building is the quantification of moods and social trends. Although the interrelationship of these variables in the model is statistical, they can be expressed in more familiar nomenclatures as described in the following pages.

# DEMOGRAPHIC FORECAST MODEL

$$\begin{aligned} &\text{Existing Resident Population} \times \text{Births}^*/\text{Deaths}^* \\ &= \text{Future } \underline{\text{Resident}} \text{ Population} \end{aligned}$$

$$\begin{aligned} &(\text{Housing Turnover}^* + \text{Housing Construction}^*) \\ &\quad \times \\ &\text{In-migrant Household Size}^* \\ &= \text{Future } \underline{\text{New}} \text{ Population} \end{aligned}$$

$$\begin{aligned} &\text{Future } \underline{\text{New}} \text{ Population} \\ &\quad + \\ &\text{Future } \underline{\text{Resident}} \text{ Population} \\ &= \text{Future } \underline{\text{Total}} \text{ Population} \end{aligned}$$

\* Variables that can be changed with different assumptions

# KEY FORECAST VARIABLES

## CONSTRUCTION

This variable permits the model user to specify the number of future dwelling units which are anticipated for every five year interval. This variable permits a distinction between two types of units, single family (including townhouses) and multi-family.

Of all the key variables, housing construction is the least difficult to estimate. The short-term future is foretold by building permits. A more distant look into the future is obtained from sewer authorizations and recorded plats. A longer term estimate can be gained from analyzing approved preliminary plans.

The long-term effect of varying construction rates can be dramatic. Annual growth rates have a cumulative impact. A rate of 2,000 new units per year adds 30,000 dwelling units over the course of 15 years. By the end of the study period, total dwelling units increasing at 2,000 per year will have been increased by just under 15 percent. New dwelling units assumed in the model will automatically increase the number of households migrating into the County. Since these "in-migrating" households have historically had more people per household than current residents, new construction will tend to mitigate declines in the household size of existing residents (unless assumptions of in-migrating household size are altered).

There has been a dramatic shift downward in the number of dwelling units constructed in the latter part of the 1970's. A significant turnaround would require a basic change in current economic conditions.

## HOUSEHOLD SIZE OF IN-MIGRATING HOUSEHOLDS

This variable requires an assumption as to the demographic characteristics of people moving into unoccupied dwelling units within the County. The characteristics of in-migrants are varied by the type of dwelling unit, single family or multi-family into which they are moving. In its rudimentary form, the model contains a probability of an in-migrant being of a specific age and sex. When multiplied by the number of vacant units, the probable distribution yields the total number of new in-migrants.

The starting point is an historic profile of in-migrants. The scenario builder has the ability to change the in-migrant household size by some percentage. The model distributes that percentage across all age groups.

Because any change in birth rates is likely to be a national trend rather than an isolated event in Montgomery County, the number of persons in-migrating who are less than five years of age are increased or decreased depending upon the birth rate.

The total number of new in-migrants are dependent upon the assumed turnover rate and the new construction rate.

## HOUSING TURNOVER

Who will remain in the County five years from now? This is the question which the housing turnover variable answers. It is the demographic measure of mobility specific to the age and sex of the population.

The more housing turns over, the greater the effect of the size of household movers on the County's average size of households. In-migrants typically have had higher average size households than the resident population. Housing vacated by mobile residents will be statistically replaced with new residents.

Mobility is a complex phenomenon which, until recently, has been relatively stable when analyzed by age. The past year has witnessed declines in housing turnover, principally for economic reasons. Dramatic jumps in mortgage rates have deterred many homeowners from giving up their old mortgages with low interest rates to purchase high priced housing with high priced money. Even owners willing to sell and move have experienced difficulty in obtaining buyers. Financially able buyers are now speculating that interest rates may drop in the near future. In other instances, current high interest rates make prospective buyers financially unable to purchase housing.

It is not difficult to envision a scenario in which turnover rates vary from current empirical experience. A healthy economy with rising real income would create conditions suitable for higher housing turnover rates. A sluggish economy with little opportunity for job change, combined with high mortgage rate and declining real income, would likely reduce turnover.

## BIRTH RATES

Birth rates can be described in several ways. It can be a crude birth rate measured by the number of births per total population. A more sensitive description, however, is to use fertility rates calculated as the number of births per thousand of women between the ages of 15 and 44. The Demographic Model goes one step further and describes birth rates by five year age intervals of women between the ages of 15 and 44. These rates are derived from Maryland State health statistics for Montgomery County.

There is probably more published speculation about future birth rates than for any other key demographic variable. As the women of the baby boom age through their childbearing years, shifts in the birth rate will be of considerable significance. Historically, there has been a long steady decline in the birth rate. However, in the last several years, the birth rate has been more erratic. This has created a demographer's field day. Have women merely been delaying childbearing? Has last year's increase in the birth rate been a statistical quirk that should be ignored? How is the current economic outlook affecting a woman's decision to bear children? There are now no clear answers to these questions.

On a County level, the short-term effect of a changing birth rate is marginal. The rate affects only one of the 18 age groupings, the 0 to 4 year olds. It takes five years for the children to reach elementary school age and at least 15 years before they themselves reach childbearing years.

Because the controversy over future birth rates is so clouded, the basic illustrative forecasts have been run with alternative higher birth rates. The birth rate is the only variable altered between the basic forecast and the alternative forecast, so its unique implications are highlighted.

## SCENARIO

### LOW GROWTH SCENARIO

Job growth significantly below the increases of the 1970's is accompanied by pernicious inflation. Labor, energy and material costs remain high and prices escalate. Interest rates also remain high and the combination of high costs and interest rates in a sluggish economy reduces the demand for, and supply of, new homes to the low point experienced in the 1970's (2,000 units per year). This scenario assumes a rate of construction which is 1,000 units per year below the current adopted "Low" forecast rate of 3,000 units per year.

The small number of new housing units and low housing turnover which occurs during periods of slack economic activity reduces the number of larger in-migrating households, thereby contributing to a decline in household size. Older households may find it more difficult to sell their homes under these economic conditions. Since empty nester households have fewer residents, average household size in the County is thereby reduced.

Offsetting this trend of reduced household size is the finding that "bad" times tend to depress the formation of new households. During periods of slow growth, persons under 25 are less likely to leave homes to form their own households. The number of one person households, therefore, may be expected to decline, thereby increasing household size.

Overall, the decline in average household size is greater than that anticipated under the high growth scenario since the lower rate of in-migration has a greater influence on average household size than the lower rate of household formations.

### HIGH GROWTH SCENARIO

This growth scenario foresees a steady recovery from the recession continuing through the 1980's. County employment is not anticipated to match the large increases of the 1970's but will expand significantly overall. With productivity on the increase and inflationary pressures subsiding, capital is available for housing construction at more attractive rates. It is assumed that housing completions will average 4,000 units per year, an average that exceeds the 1975-1979 performance but does not match that of the early 1970 period. The 4,000 unit per year average is equal to the construction rate assumed for the current adopted "Intermediate" forecast. The current adopted "High" forecast assumes a 5,000 unit per year average. Essentially, this means that the forecast reassessment suggests that the adopted "High" forecast be replaced by the "Intermediate" forecast and that there is a need for a new "Low" forecast.

An increase in new housing completions will lead to increased in-migration. In addition, turnover in the existing housing stock may be expected to increase due to the favorable economic climate. This scenario may be particularly significant for elderly householders who find it more attractive to sell their homes, thereby increasing the number of in-migrants with larger households. Previous analysis has demonstrated that, on average, the household size of in-migrants has been higher than the longer term residents; therefore, increased housing turnover and new construction may be expected to slow the decline in average household size.

Offsetting increases in household size arising from in-migration may be the increased propensity of persons under 25 to form their own households. In addition,

favorable economic conditions and increased economic freedom for women, affects divorce rates. Divorces add to the number of households but reduce its size.

Overall, growth in households is expected to exceed the growth in population leading to a decline in average household size which is less than that foreseen under low growth conditions.



# CONVERSIONS

Variable	Units	Forecast Range		Past Conditions			
		Low Chosen Assumption	High Chosen Assumption	1975-1980	1970-1975		
Construction	Average annual dwelling units	2,000	4,000	3,400	6,600		
Housing Turnover	Annual Average of the percent of households moving out of the County	5.0%	6.4%	5.4% <sup>1</sup>	6.8% <sup>2</sup>		
In-Migrant Household	Average persons per household	Multi-Family 2.65	Single Family 3.18	Multi-Family <sup>1</sup> 2.00	Single Family <sup>1</sup> 3.5	Multi-Family <sup>2</sup> 2.4	Single Family <sup>2</sup> 4.10
Birth Rate (Fertility Rate)	Number of births per 1,000 women aged 15 through 44.	50.0	50.0	48.0	58.2		

<sup>1</sup> Extracted from the 1977 Census Update, pertains to in-migrants between 1972 and 1977.

<sup>2</sup> Extracted from the 1974 Census Update, pertains to in-migrants between 1970 and 1974.

# NUMBERS

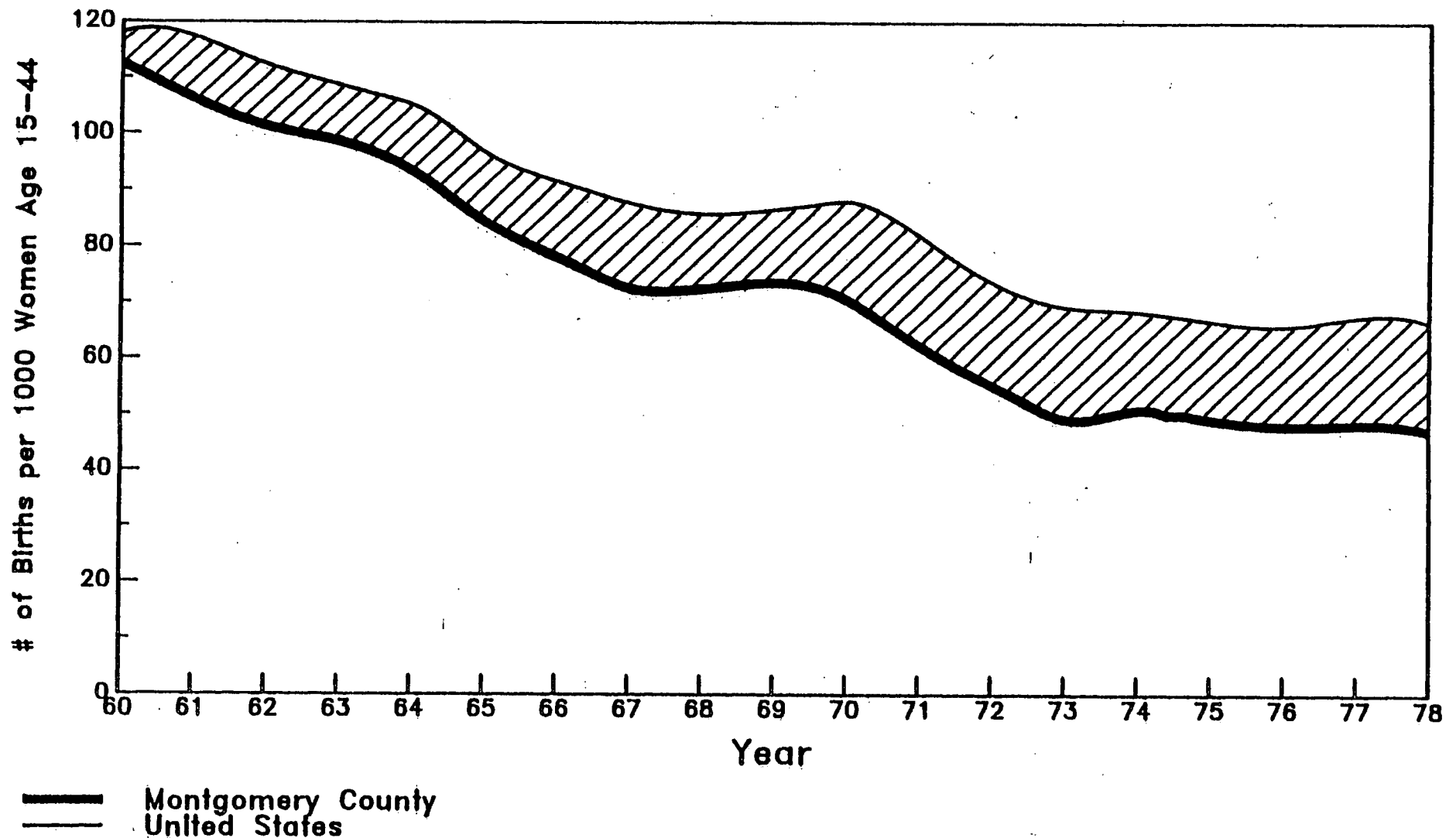
	LOW FORECAST				HIGH FORECAST		
	<u>1980</u>	<u>1985</u>	<u>1990</u>	<u>1995</u>	<u>1985</u>	<u>1990</u>	<u>1995</u>
Total Population <sup>1</sup>	574,400	577,300	568,900	574,200	586,900	621,900	667,400
Household Population <sup>2</sup>	569,000	571,600	562,900	567,700	581,200	615,900	660,900
Average Household Size	2.76	2.64	2.48	2.40	2.58	2.49	2.45
School Age Population:							
Primary (5-11)	60,000	48,700	41,500	39,600	51,100	51,300	55,100
Junior (12-14)	29,400	24,200	20,100	18,300	24,500	23,400	24,600
Senior (15-17)	31,500	29,500	24,800	21,600	29,500	26,700	26,200
Total	120,900	102,400	86,400	79,500	105,100	101,400	105,900
Average Number of Births Previous 5 Years	6,700	7,200	6,800	6,300	7,200	7,200	7,400
Total Households	206,600	216,600	226,600	236,600	225,000	247,500	270,000

<sup>1</sup> Total population includes those living in group quarters (institutions, military barracks, etc).

<sup>2</sup> Household population totals excludes those living in group quarters.

# COMPARISON OF BIRTH RATES 1960-1978

## MONTGOMERY COUNTY AND THE UNITED STATES



## SCENARIO

### LOW GROWTH SCENARIO: HIGHER BIRTH RATES

The social and economic conditions described earlier as the "Low Growth Scenario" remains unchanged, except that this scenario assumes birth rates which are higher by 20 percent. During periods of slow economic growth, women may find it more difficult to find or keep their jobs. They may return to their more traditional roles in planning a family. Because the baby boom generation is moving into the 25-34 age bracket, women who have delayed raising a family are reaching the point of decision. Historically, birth rates have generally followed economic patterns, rising during periods of prosperity and falling during depressed periods. However, the special circumstances associated with the baby boom generation may alter this relationship.

### HIGH GROWTH SCENARIO: HIGHER BIRTH RATES

The social and economic conditions described earlier as the "High Growth Scenario" remains unchanged, except that this scenario assumes birth rates which are higher by 20 percent. An increase in the number of families with dual breadwinners is assumed to increase the financial security of households and present an environment in which an increase in the number of births may be anticipated. As previously noted, the baby boom generation is moving into age groups most closely linked with fertility. Many will be entering age categories in which decisions regarding family planning cannot be delayed. Potential changes in social and economic behavior have significance for changes in marriage and family structure. These changes may accommodate a high birth rate.

Illustrative Forecast  
Alternative Range

# CONVERSIONS

Variable	Units	Low	High	Past Conditions					
		Chosen Assumption	Chosen Assumption	1980-1975	1975-1970				
Construction	Average annual dwelling units	2,000	4,000	3,400	6,600				
Housing Turnover	Annual Average of the percent of households moving out of the County	5.0%	6.4%	5.4% <sup>1</sup>	6.8% <sup>2</sup>				
In-Migrant Household	Average persons per household	Multi-Family 2.65	Single Family 3.18	Multi-Family 1.99	Single Family 3.18	Multi <sup>1</sup> Family 2.00	Single <sup>1</sup> Family 3.5	Multi- <sup>2</sup> Family 2.4	Single <sup>2</sup> Family 4.10
Birth Rate (Fertility Rate)	Number of births per 1,000 women aged 15 through 44.	60.0	60.0	48.0	58.2				

<sup>1</sup> Extracted from the 1977 Census Update, pertains to in-migrants between 1972 and 1977.

<sup>2</sup> Extracted from the 1974 Census Update, pertains to in-migrants between 1970 and 1974.

Illustrative Forecast  
Alternative Range

# NUMBERS

	ALTERNATE LOW FORECAST				ALTERNATE HIGH FORECAST		
	<u>1980</u>	<u>1985</u>	<u>1990</u>	<u>1995</u>	<u>1985</u>	<u>1990</u>	<u>1995</u>
Total Population <sup>1</sup>	574,400	584,300	579,700	588,000	594,200	633,400	682,000
Household Population <sup>2</sup>	569,000	578,600	573,700	581,500	588,500	627,400	675,500
Average Household Size	2.65	2.67	2.53	2.46	2.61	2.54	2.50
School Age Population:							
Primary (5-11)	60,000	48,700	45,300	44,300	51,100	54,800	59,800
Junior (12-14)	29,400	24,200	20,100	20,100	24,500	23,400	26,000
Senior (15-17)	31,500	29,500	24,800	21,600	29,500	26,700	26,200
Total	120,900	102,400	90,200	86,000	105,100	104,900	112,000
Average Number of Births Previous 5 Years	6,700	8,200	7,600	7,400	8,600	8,900	9,400
<u>Total Households</u>	<u>206,600</u>	<u>216,600</u>	<u>226,600</u>	<u>236,600</u>	<u>225,000</u>	<u>247,500</u>	<u>270,000</u>

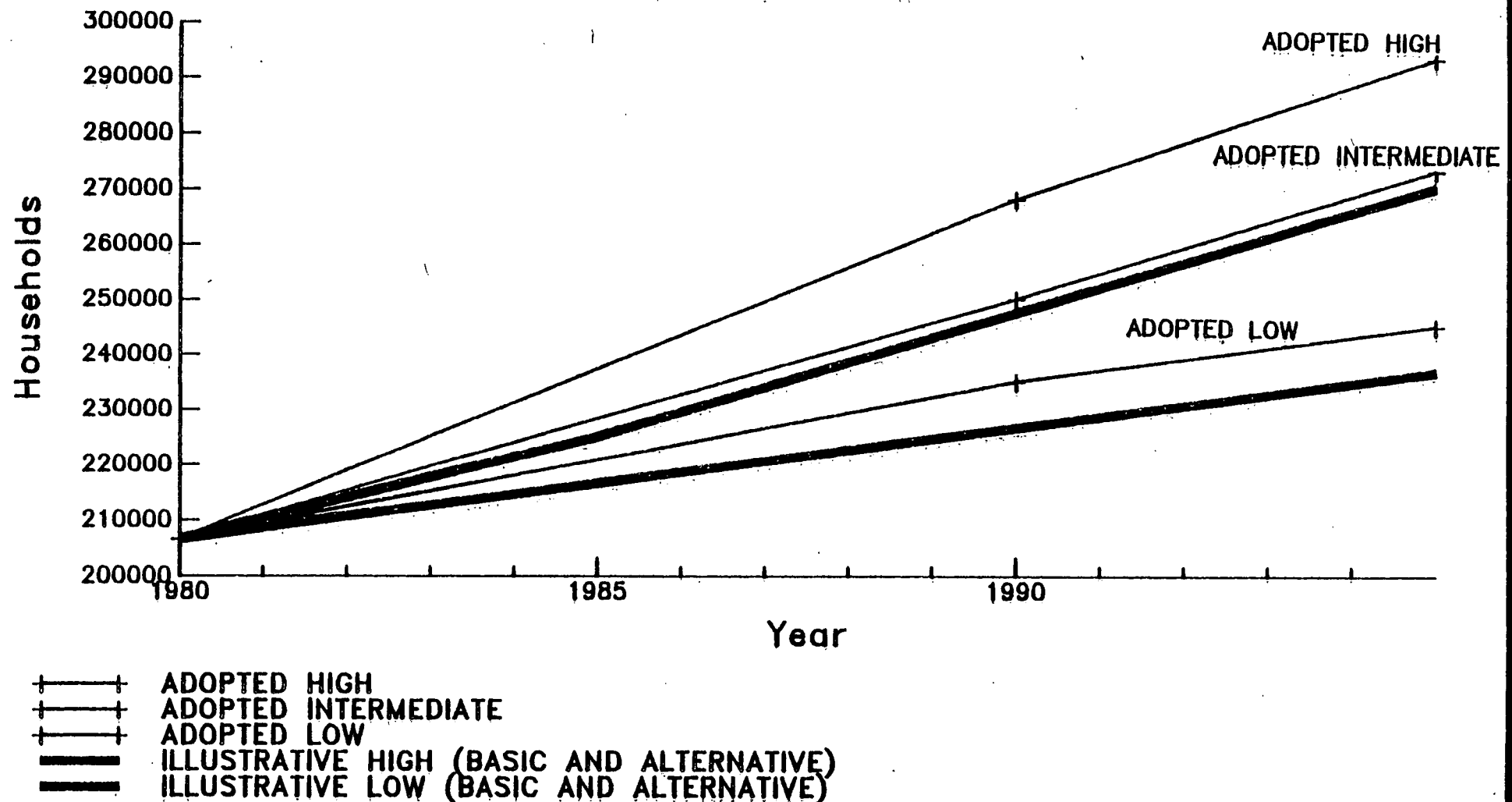
<sup>1</sup>Total population includes those living in group quarters (institutions, military barracks, etc).

<sup>2</sup>Household population totals excludes those living in group quarters.

# COMPARISON OF HOUSEHOLD FORECASTS 1980-1995

## NEW ILLUSTRATIVE FORECASTS AND ADOPTED FORECASTS

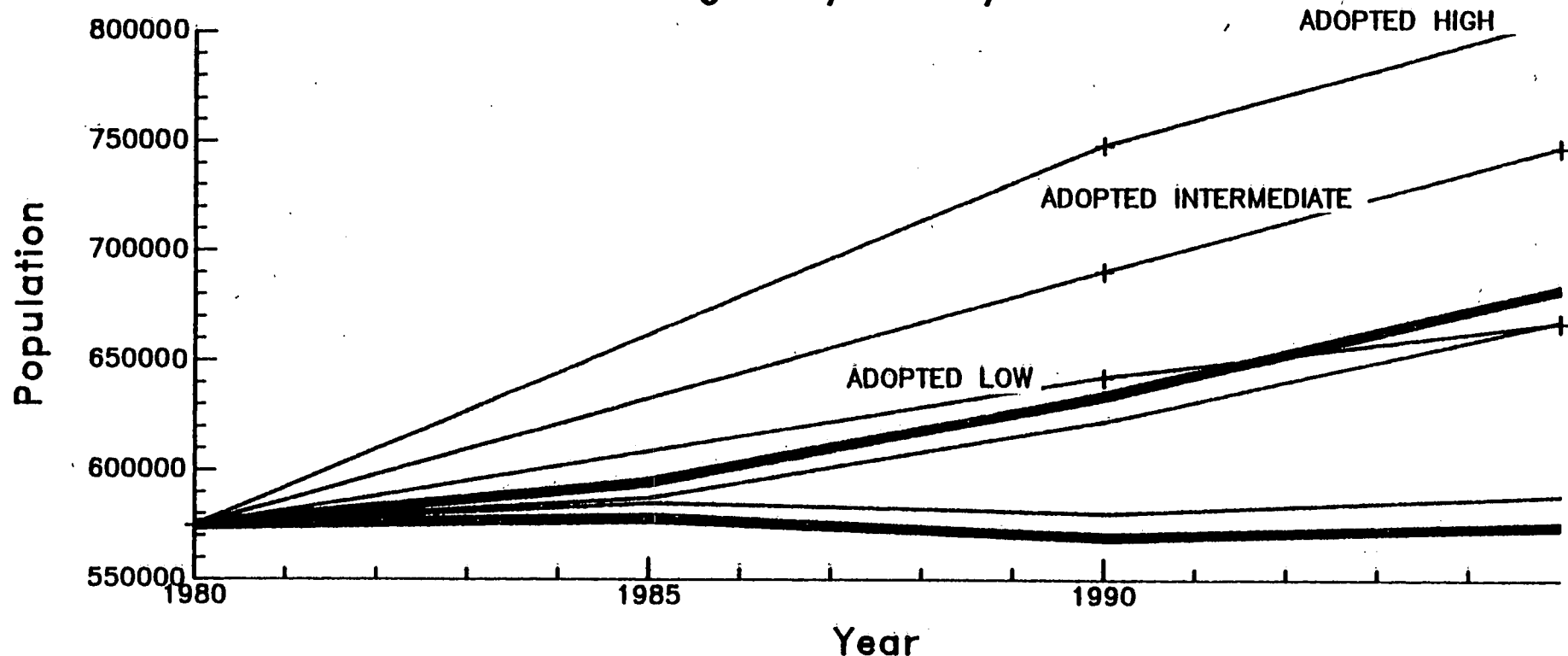
### Montgomery County



# COMPARISON OF POPULATION FORECASTS 1980-1995

## NEW ILLUSTRATIVE FORECASTS AND ADOPTED FORECASTS

### Montgomery County



- +—+— ADOPTED HIGH
- +—+— ADOPTED INTERMEDIATE
- +—+— ADOPTED LOW
- +—+— ILLUSTRATIVE ALTERNATE HIGH
- +—+— ILLUSTRATIVE BASIC HIGH
- +—+— ILLUSTRATIVE ALTERNATE LOW
- +—+— ILLUSTRATIVE BASIC LOW



## CONTRIBUTING STAFF

Richard E. Tustian . . . . . Planning Director  
Drew Dedrick . . . . . Chief of Special Projects

### Special Projects Division

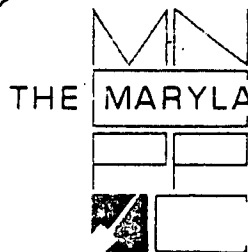
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THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

8787 Georgia Avenue • Silver Spring, Maryland 20907

(301) 589-1480

June 9, 1980

Dear Panel Member:

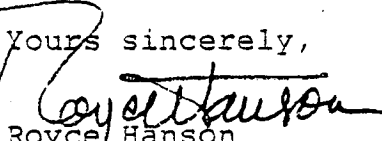
We look forward to your participation in our Scenario Workshop this Thursday and Friday, June 12 & 13. Enclosed is an agenda and some background information, which may help you prepare your thoughts for the exercise.

I have asked our Planning Director, Richard Tustian, and some of his staff, to act as facilitators for the session, and to chair the wrap-up session Friday afternoon. However, in order to more fully involve the panel members, I am also requesting that each of you be prepared to chair one of the 1½ hour segments that deal with individual scenario factors. Our tentative assignment, subject to your approval, is as noted on the attached panel roster.

We have changed the place of the meeting to the third floor conference room in our main building at 8787 Georgia Avenue, Silver Spring, which is situated next to the Holiday Inn, at the north end of the central business district, at the intersection of Georgia Avenue and Spring Street. We will be more certain of air conditioning and other amenities in this location. Parking will be available in our own lot immediately behind our building, with an entrance off Georgia Avenue between our building and the Holiday Inn.

We are very pleased that you are able to join us.

Yours sincerely,

  
Royce Hanson  
Chairman

RH:RET:mab

Enclosures

June 9, 1980

M E M O R A N D U M

TO:           Montgomery County Planning Board  
              Scenario Workshop Panel

FROM:         Planning Director Tustian

SUBJECT:      Suggested Approach to Workshop

As mentioned in Chairman Hanson's letter to panel members, the purpose of the workshop is to develop several "scenarios" for the next decade. I accept the definition of a scenario as being analogous to a novel, with a set of characters (factors) and a story line involving these characters (factor projections). Such a scenario differs from a statistical projection, or a technical model, in that it emphasizes the logic and meaning of the story line more than any numbers that may be involved. Staff proposes that this exercise be "ordinal" rather than "cardinal," and focus on possible changes in trends rather than attempts at precise quantification.

So far as I can tell, the art of scenario construction for planning purposes is still exploratory. Consequently, ideas for improving the process are welcome. To provide a framework, however, the following format is suggested, as outlined in the attached agenda: Elaboration of the process will be discussed during the opening segment of the workshop.

The six factors of People, Work, Home, Community, Transport, and Nature are suggested as a convenient set of factor clusters, which have the advantage, from a Planning Board perspective, of meshing neatly with the growth management model already developed. (See attached Growth Policy Report, page 1-1 thru 1-5.)

Obviously, life is a seamless web, and each factor overlaps and influences the others. It is suggested to begin with Nature, since the constraints that are imminent there seem to overshadow the other forces at work in the overall situation. It is proposed to develop at least two different scenarios for each factor without attempting to assign probabilities to them; and to compare any inconsistencies that may become apparent among the different factor projections at the end of the exercise.

Rather than burden the panel members with voluminous statistical documents, I am attaching just one article from U.S. News and World Report. Hopefully, this will stimulate some thought without too much time consumption, and also convey our search for a scenario approach that focuses more on meaning and interpretation

Memorandum  
June 9, 1980  
Page 2

than on mathematical extrapolation. Staff will be on hand with data about the county and the region, should we want it during the discussion.

The sub-factors noted on the agenda are a first cut at identifying elements to which trends may be assigned. Trends may be thought of as either holding steady with past experience or changing significantly. Significant changes may be either higher or lower, larger or smaller, better or worse, or other indicators of divergence from the present flow of events. Special interest will be attached to opinions that suggest any forthcoming radical shifts in the pace of change, or major discontinuities or events that seem probable.

Following completion of the workshop, staff will prepare a draft of the proceedings from the tape, and circulate it to the panel members and Planning Board before preparing a written report for publication. It is hoped that these scenarios will be useful in stimulating further thought about possible alternative futures for the nation and our region, and provide some basis for further staff work in preparing more technical forecasts for the county.

RET:mab

Attachments

## R O S T E R

Panel Members for  
Montgomery County Planning Board  
SCENARIO WORKSHOP  
June 12-13, 1980

NATURE	-	Mr. Clay H. Wellborn Library of Congress James Madison Building Washington, D.C. 20540
PEOPLE	-	Professor Harriett Presser 10871 Bucknell Drive Wheaton, Maryland
WORK	-	Dr. Coleman Raphael 508 Hermleigh Road Silver Spring, Maryland
HOME	-	Dr. Anthony Downs 1775 Mass. Avenue, N.W. Washington, D.C.
COMMUNITY	-	Dr. Steven Sharfstein 7800 Mary Cassatt Drive Potomac, Maryland
TRANSPORTATION	-	Mr. Raymond W. Cox III 1800 G St., N.W. Washington, D.C. 20530

## A G E N D A

### Montgomery County Planning Board SCENARIO WORKSHOP June 12 - 13, 1980

#### THURSDAY

---

Coffee & Doughnuts

9:00 A.M. - Overview - Panel/Board/Staff Introductions

- Objectives/Format & Questions

9:50 A.M. - Coffee Break

10:00 A.M. - Nature - Energy: Oil/Gas/Coal/Nuclear/Solar

- Agriculture: Soils/Climate/Productivity

- Pollution: Water Quality, Air Quality/

Wildlife

- Enjoyment: Wilderness/Trails/Camps/Parks

12 NOON - Lunch (Served in the Building)

1:00 P.M. - People - Growth Rate

- Age/Sex

- Ethnic/Race

- Skills/Education

- Mobility/Migration

- Family Character

3:20 P.M. - Coffee Break

3:30 P.M. - Work - Labor/Capital

- Technology/Production

- Goods/Markets

- Taxation/Inflation

- Income/Wealth

5:00 P.M. - Adjourn

A G E N D A

Montgomery County Planning Board  
SCENARIO WORKSHOP  
June 12-13, 1980

FRIDAY

---

Coffee & Doughnuts

- 9:00 A.M. - Home
- Household Size/Life Styles
  - Incomes/Savings
  - Costs/Financing
  - Housing Types/Mixtures
  - Production/Availability

10:30 A.M. - Coffee Break

- 10:40 A.M. - Community
- Education/Culture
  - Recreation/Entertainment
  - Health/Safety
  - Welfare/Ethics/Religion
  - Politics/Governance

12:30 P.M. - Lunch (Served in the Building)

- 1:30 P.M. - Transport
- Fuel Supplies/Costs
  - Freight Modes
  - Automobile Types/Efficiencies
  - Transit Options/Costs
  - Accessibility/Choices
  - Electronic Substitutes

3:00 P.M. - Coffee Break

- 3:10 P.M. - Summing Up
- Observations
  - Inconsistencies
  - Major Themes
  - Nation vs. Washington Region
  - Evaluation

5:00 P.M. - Adjourn

32-Page  
Special  
Section



## CHALLENGES OF THE '80s

**N**ever have Americans looked ahead to a new decade with more uncertainty than they do now with the approach of the 1980s. Emerging from the 1970s is a nation aware of limits on its natural resources, a decline in global security, and its failure, so far, to solve the great worries of seemingly nonstop inflation and energy shortages, let alone social conflicts at home and rising questions about U.S. leadership abroad.

Such misgivings in any other society might plunge it into apathy or despair. Not in America—not yet, anyway.

What lies ahead is a decade unlike any in this century: Challenging in its opportunities for constructive change and immense progress, but lacking the promise of clear answers to the nation's basic concerns.

In past decades, forecasters have relied heavily on the belief that dramatic advances in technology, an American tradition, would shape the years ahead.

To be sure, there will be technological gains in the 1980s, too. The U.S. will enter a new era of retrievable space shuttles and platforms, for example, and





**Working Americans:** In numbers and power, they will dominate the U.S. economy and society.

advances ranging from two-way television in the home to new medical knowledge will improve the quality of life of tomorrow's Americans, especially the fast-growing legions of aged.

Still, the new decade and what it brings—peace or war, prosperity or hardship—will be defined less by technology than by changing population patterns and economic, social and political shifts already evident.

### More Conservative, More Prosperous

America will enter the 1980s with a population tilted toward working-age Americans. During the decade, the prime generation of earners and spenders, age 25 to 50, will rise from 32.5 to 37.6 percent of the population.

Contrarily, low birth rates of the past 20 years will keep Americans under 22 years old to a relatively small part of the population through the decade and beyond, though births will rise numerically as the childbearing potential of the "baby boom" generation comes into full play. At the other end of the age spectrum, the elderly will set records both in numbers and share of total population.

By themselves, such projections suggest a 1980s profile of a more conservative but more prosperous America dominated—economically, anyway—by pressure for better jobs and pay, and by markets built more around the needs and pleasures of working adults and the elderly and less around children.

The decline in the teen-age population indicates restraints on heavy outlays for education and a decline in high rates of juvenile crime that have afflicted America in recent times.

All these projections, however, may be just partly true. Only a few months ago, economists were saying that Americans might face a doubling of prices by 1990—an estimate that, at the current 13 percent rate of inflation, is beginning to look optimistic.

Accordingly, the diminishing group of nonworking mothers is likely to become an endangered species as family costs keep going up.

### Troubles for Higher Education

Except for the most prestigious of the private institutions, higher education will become even more the preserve largely of community colleges and state-run universities. For churches and foundations, too, the financial squeeze of recent years will tighten.

Despite lessening racial and religious prejudices, competitive tension is likely to worsen under inflation's lash. Blacks, Hispanics, women and other disadvantaged groups

will press harder for their full share of jobs and will meet even sterner resistance. Friction will intensify and spread with the continued influx of hundreds of thousands of aliens—many of them illegal—every year.

In many ways, a population mix so strongly oriented to the American worker should be moving with certainty into a future blessed with stability, prosperity and progress.

Reaching those goals is possible. But it will be far harder than before for a nation coping with complex new technology and communications—and the disillusionment of discovering that every solution brings other

problems. Peter Schwartz, head of Futures Research at the Stanford Research Institute [SRI International], observes: "The problems of the future will differ fundamentally from former problems that we have dealt with successfully. In the past, human energy focused on solving the problems of the world as we found it. The future's critical problems will be those of the world as we have made it."

Thus it is likely that a good part of the future's tasks will be the revising of past decisions that altered U.S. education, politics and social policies, almost as often for the worse, it seems, as for the better.

Educators are scrambling to restore basic skills and academic goals, from kindergarten to universities. Social-welfare institutions and the courts are under growing pressure to backtrack from permissive policies. And many political theorists are taking a fresh look at egalitarian politics that put a premium on special interests and fragmented leadership rather than, as in the past, on building a consensus behind strong decision makers.

Low birth rates in the last 20 years will assure graduates in the coming decade of a welcome in the job market. It may be a different story within the oversized baby-boom generation already on the job—workers now in their late 20s and 30s.

For many in that group, the '80s will bring heavy disappointment and declining morale. Reason: As they go through the promotion sieve, the less competent will be stranded in less rewarding jobs.

### Sources of Conflict, Here and Abroad

Similarly, potential for friction exists in the rise of the elderly as a politically active and numerically stronger group on whom the nation will be spending more and more of the taxes collected from the wage-earning generation.

In many of the nation's cities, a return of well-educated and prosperous Americans—mostly young and moving upward—is reversing the urban decay that began with the middle-class flight to the suburbs a generation ago.

Yet this "solution," too, raises a question: Can the cities offer peace and stability when occupied primarily by two classes, the affluent young professionals and the desperately poor, who do not share similar backgrounds, values, needs or desires?

These and other unanswered concerns within the U.S. will be accompanied, even more than in the 1970s, by the rising uncertainties of America's security abroad: Russia's bid for military primacy, the declining position of the U.S. in world trade, and the still-unmet challenge of U.S. dependence on oil-producing nations as the energy shortage

# Taking Shape: A Bigger, Different Population

As America adds 21 million people, the new mix of ages, races, regional spread will affect business, crime, even taxes.

Of all the factors that will affect people's lives in the '80s, few will have a bigger impact than the shifts ahead in America's population—

Growth in the number of Americans will speed up. Population will expand by about 21 million in the coming decade, or 3 million more than in the 1970s. By 1990, the country will have an estimated 242 million people.

The big increase will be in older, more affluent age brackets. Four fifths of the population growth will be in persons in their 30s and 40s, most of the rest in the age 60-and-older group.

Births will increase from 33 million in the 1970s to 39 million in the '80s. This upswing is to result from a large increase in women in their childbearing years, not from any increase in the birth rate.

The number of Americans under age 20 will fall below 30 percent of the population for the first time in history. The reason: A sharp decline in the number of teen-agers, resulting from the smaller rate of births in the '60s and '70s.

People over 65, most of them retired, will account for 1 out of every 8 Americans by the end of the decade. Increased longevity because of better health care will raise the number of people in this age group by 5 million, to a total of 30 million by 1990.

A dramatic increase is expected in the oldest age bracket, people 75 or over. Growth of this age group during the '80s will total 2.6 million, accounting for 12 percent of the na-

## Population—KEY FORECASTS

**Age:** Nation will grow older on average, forcing business, politics to woo more mature audience.

**Births:** Number will increase but not birth rate.

**Blacks:** Will increase in proportion to whites; Asians will double their share of population.

**States:** Big gainers—California, Florida, Texas.

**Teen-agers:** Decline in number means less crime, fewer military volunteers.

tion's total population growth and bringing the number of such senior citizens to more than 12 million.

These changes in the nation's population picture for the decade ahead are computed by the magazine's Economic Unit, based on official projections. For a look at what these shifts will mean—

## A Changing Labor Force

The American labor force will grow more slowly and increase in experience as fewer young workers seek jobs. Unemployment is expected to lessen.

The biggest decline will be largely in unskilled young

worsens in the mid-1980s. The years ahead, analysts also warn, will bring other revolutions, as in Nicaragua, and other Soviet-backed civil wars; as in East Africa.

Moreover, the breathing spell provided by the Egyptian-Israeli Peace Treaty will not last forever, and there is little sign of progress toward the goal of bringing other Arab nations into the peacemaking effort.

Perhaps worse: Pakistan's announced goal of developing its own atomic arms underscores the reality of a long-feared global threat—nuclear proliferation. By some estimates, as many as 35 nations, big and small, may have atomic capability by the end of the coming decade.

Not everything is going Russia's way. The Soviet empire in Eastern Europe is weakening at the seams with a growing input of Western goods and ideas.

Worldwide, though less so in Third World nations, Russian-style Communism as the model for economic and social change is becoming an object of pity and ridicule, not emulation. Thus Moscow, increasingly, is left with little to brandish except armaments—a situation with a worrisome potential.

## The Revisionary Decade

Yet a question lingers: Can the U.S. develop the wit and, more importantly, the will to define realistically and to act on the challenges and opportunities of the coming decade?

Daniel J. Boorstin, a historian and the librarian of Congress, writes in *The Republic of Technology: Reflections on Our Future Community* that American life historically has not been chained to the absolute premises of European culture. Accordingly, the nation has thrived on continuous experimentation as "a technique to test and revise ideas"—a process which sometimes has produced anarchy and gross materialism, but also "creative chaos, endless variety and open opportunity."

What this offers is a chance for the '80s to become one of America's great revisionary decades by discarding the failures of this century's liberal-populist revolution, expanding its successes and pressing on to fresh answers.

In the 1970s, the wounds inflicted on national morale—the failure in Vietnam, the revelation of U.S. vulnerability to Middle East oil producers and the Watergate scandals—put a damper on the long-overdue process of setting new goals and finding new ways of meeting them.

Among young adults, traces of the disarray of the 1960s are still evident in the wide abuse of drugs, a lower premium on the marriage vows or raising children, and what many sociologists have described as a hedonistic self-concern—heightened by the worries of coping with inflationary erosion of the dollar's value.

Even so, some surveys suggest that a moderating process has already brought the young some distance from the excesses of the 1960s in a quest for lasting values. Despite warnings of a national malaise, the large majority of America's 221 million people seem convinced that there are workable solutions somewhere—if only leadership for the times would assert itself.

From historian Arthur Schlesinger, Jr., in the *Wall Street Journal* comes this thought on the immediate future of Americans: "The issue is evidently not so much conservatism vs. liberalism as it is fatigue vs. vitality. When the dam breaks again in the 1980s, as it has broken every 30 years or so during this century, we will stop proclaiming our inability to do anything about our problems and stop luxuriating in our conviction of public impotence. . . . What we need today is not sanctimonious exhortation but detailed investigation and hard thought. For, when the new age of experimentation comes, it would be useful if we had some good experiments to try." □

men age 16 through 24, as the size of this age group shrinks. One result will be growing difficulty for the armed services in enrolling new recruits.

Women will be joining the labor market in even greater numbers. Some 50 percent of those age 25 to 54 worked at or sought paid jobs in 1970, and about 60 percent do so now. But more than 70 percent will be in the job market by the end of the 1980s, for a total of 38 million.

Somewhat fewer men in the 25-to-54 age group will join the work force. Their total will reach 46 million by the end of the 1980s. As more men opt for early retirement, the portion of working-age males participating in the job market will continue its slow decline, from 80 percent in 1970 to 78 percent in 1980 and to 76 percent in 1990.

Blacks in the labor force will increase at a faster rate than whites will. By 1989, the U.S. job force will have about 15 million blacks, with men and women in nearly equal numbers.

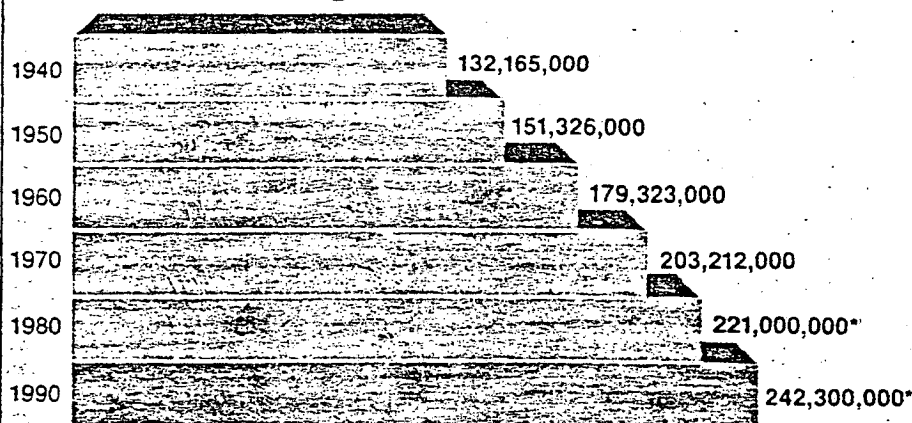
Employment will rise by more than 16 million over the coming decade, compared with an increase of 18 million in the 1970s. At the end of the '80s, about 113 million Americans will have jobs. With fewer hard-to-place teen-agers on the market, one of the most nagging problems of the 1970s will ease as unemployment declines to possibly 5 percent of the labor force.

### New Consumer Demands

Business will see its customers change, requiring many firms to take a fresh look at their retail-sales strategies. For

## Still Growing

### U.S. Resident Population



\*Estimate based on projection of trends in 1970-78.

Thus, population is expected to grow by 9.6 percent in the coming decade—a slight spurt from the 8.8 percent rate of the '70s.

US&WR chart—Basic data: U.S. Dept. of Commerce

example, the decline in today's big teen-age market will result in less demand for such things as blue jeans, records, tapes, old cars, some athletic gear and "junk food" products consumed by high-school students.

But an increase in the number of births will bring an upturn in the presently lagging demand for baby food, infants' clothes, toys and services.

Demand will increase, too, for a broad spectrum of goods and services needed by larger numbers of people in their 30s and 40s. With growing families and rising incomes, they will require more cars, furniture, clothes, vacation facilities, outdoor equipment and especially housing—both homes and apartments.

Biggest increase in demand will come from the burgeoning number of Americans over 65, many of them healthier and wealthier than today's senior citizens. This points to a new boom in the leisure industry—from hobbies and movies to ocean cruises and recreational vehicles. It also will spur demand for nursing homes, health clinics and retirement developments.

### The Impact on Schools

Most communities will find their school systems unbalanced during the coming decade. Fewer teen-agers will mean that many high schools will have to close down or cut back. Grade schools that were closed during the '70s may have to be reopened during the '80s, as the number of births increases and the trend to preschool classes extends to more segments of the population.

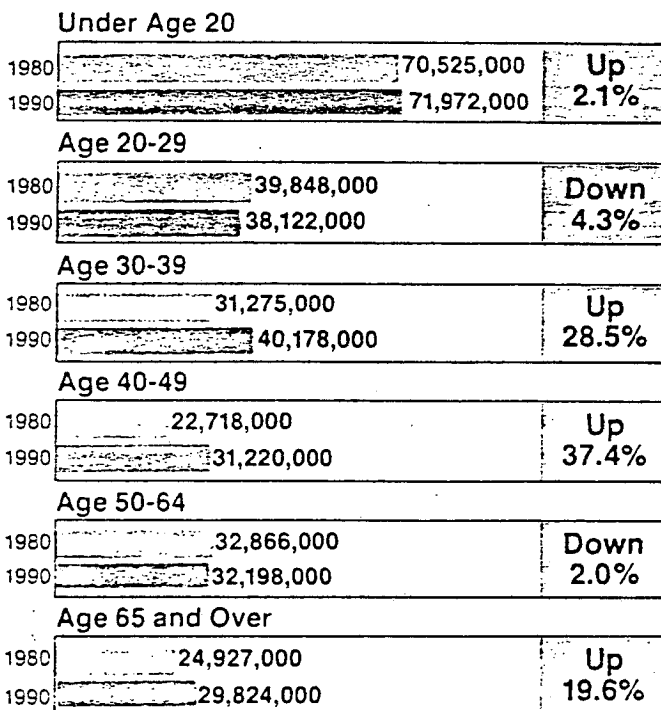
Colleges, which expanded rapidly during the past decade, already are finding their supply of students dropping off. Many institutions will be forced to contract sharply or close down altogether as the number of potential collegians age 19-22 descends further and faster during the '80s. The alternative: New, stepped-up emphasis on graduate work and classes for retirees or working students.

### Lifestyles and Families

The day of the big family will recede further, population experts say, as the '80s bring a jump in the number of people living alone or as childless—often unmarried—couples.

While the total number of households—separate living units of one person or more—rises from 80 million in 1980 to a record 97 million in 1990, the average size of the American household thus will continue to decrease. From

## How Age Mix Will Change

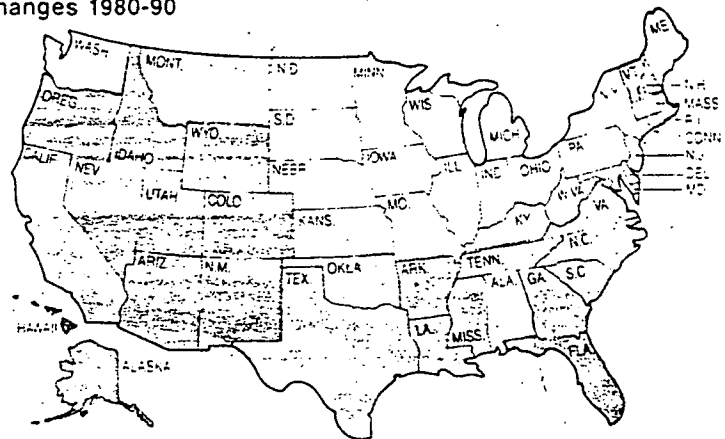


US&WR chart—Basic data: U.S. Dept. of Commerce



## Population Changes 1980-90

- ☐ Loss
- ☐ 0-9% Gain
- ☐ 10-19% Gain
- ☒ 20% or More Gain



Note: Based on 1970-78 growth rates.

USNA W-90-000—Basic data: U.S. Dept. of Commerce, USNA W-90 Economic Unit

## The Tally, State by State

	1980	1990	Percentage		1980	1990	Percentage		1980	1990	Percentage
	Population	Population	Change		Population	Population	Change		Population	Population	Change
Alabama	3,640,000	4,200,000	9.4%	Kentucky	3,570,000	3,920,000	9.8%	Ohio	10,840,000	10,870,000	.3%
Alaska	490,000	440,000	10.0%	Louisiana	4,040,000	4,450,000	10.1%	Oklahoma	3,000,000	3,400,000	13.3%
Arizona	2,470,000	3,500,000	41.7%	Maine	1,100,000	1,240,000	12.7%	Oregon	2,520,000	3,040,000	20.6%
Arkansas	2,260,000	2,600,000	15.0%	Maryland	4,150,000	4,500,000	8.4%	Pennsylvania	11,680,000	11,690,000	.1%
California	22,950,000	26,000,000	13.3%	Massachusetts	5,770,000	5,850,000	1.4%	Rhode Island	935,000	910,000	-2.7%
Colorado	2,770,000	3,500,000	26.4%	Michigan	9,280,000	9,620,000	3.7%	South Carolina	3,000,000	3,450,000	15.0%
Connecticut	3,035,000	3,200,000	3.4%	Minnesota	4,050,000	4,300,000	6.2%	South Dakota	690,000	720,000	4.3%
Delaware	565,000	630,000	7.7%	Mississippi	2,430,000	2,680,000	10.3%	Tennessee	4,460,000	5,000,000	12.1%
District of Columbia	670,000	580,000	-13.4%	Missouri	4,960,000	5,110,000	3.0%	Texas	13,400,000	16,050,000	19.8%
Florida	6,650,000	11,920,000	34.7%	Montana	820,000	920,000	12.2%	Utah	1,380,000	1,750,000	26.8%
Georgia	5,140,000	5,900,000	14.8%	Nebraska	1,570,000	1,680,000	7.0%	Vermont	490,000	550,000	12.2%
Hawaii	900,000	1,100,000	22.2%	Nevada	720,000	1,000,000	38.9%	Virginia	5,175,000	6,000,000	15.9%
Idaho	920,000	1,180,000	28.3%	New Hampshire	900,000	1,100,000	22.2%	Washington	3,940,000	4,320,000	9.6%
Illinois	11,240,000	11,420,000	1.6%	New Jersey	7,320,000	7,520,000	2.7%	West Virginia	1,860,000	1,970,000	5.9%
Indiana	5,430,000	5,620,000	3.5%	New Mexico	1,260,000	1,550,000	23.0%	Wisconsin	4,710,000	5,070,000	7.6%
Iowa	2,910,000	2,990,000	2.7%	New York	17,400,000	17,090,000	-1.8%	Wyoming	460,000	600,000	30.4%
Kansas	2,360,000	2,500,000	5.0%	North Carolina	5,670,000	6,400,000	12.9%				
				North Dakota	650,000	700,000	7.7%	U.S. Total	221,000,000	242,300,000	9.6%

3.3 people in 1960, it will drop to 2.7 in 1980 and to a low of 2.5 by 1990.

The number of individuals living alone, often as a result of divorce, is expected to increase more than any other category, up from less than 7 million in 1960 to more than 25 million by the end of the '80s. This compares with an increase in the number of families from 45 million to 68 million during the same period.

### Coming Racial Shifts

Blacks will increase both in numbers and as a proportion of the population during the next decade, giving them increasing political and economic muscle. They now total about 26 million or 11.8 percent of Americans. By the end of the '80s, they will number 30 million, or 12.2 percent.

Asians and other racial minorities are expected to increase even faster, but from a relatively small base—up from 1.3 percent of the population in 1970 to 2.7 percent by 1990.

Whites will increase in number from just over 190 million now to 207 million at the end of the '80s. As a share of the population, whites will decline from 86.2 percent now to 85.1 percent.

### Crime and Punishment

The rate of serious crime in America, headed upward again at this time, is almost certain to subside in the 1980s,

criminologists say. The reason: A decline in the number of teen-agers and young adults. Those under 25 accounted for 56 percent of all arrests in 1977, the latest figures available.

With any substantial decrease in the rate of crime, planners foresee a lessening need for costly new police equipment, new jails and correctional institutions. There is even hope that these cutbacks may help to hold down the steady increase in city and state taxes.

As population patterns change, the impact will be felt by industry, residential areas, schools, local governments and nearly everyone.

### Population Swings Ahead

Within the big metropolitan areas, people will continue to move away from the central cities to the suburbs, leaving just 22.9 percent of Americans living inside the cities, down from 27 percent today. The suburbs will continue to expand as more blacks, low-income whites and blue-collar families move in—but not as fast as in the 1970s.

The big swing to the sun belt will continue, with vast numbers moving from the North and East to the South and West. Biggest gainers from this shift will be California, Florida and Texas, which will each add at least 2.5 million people if present trends continue.

What it all adds up to is that population changes of many kinds, now under way, are set to have widespread effects on life in America during the decade ahead. □

# How Life's Pulse Will Change In Next 10 Years

**Surprises aplenty—home computers, an entertainment explosion, new ways to cook, an electric car and much more—will transform people's habits, setting the stage for further advances in the years beyond.**

A revolution in lifestyles over the next decade? Not quite, but enough changes will occur to make the 1970s look a bit old-fashioned.

Some of the most exciting developments will occur inside the home, which will feature elaborate entertainment centers, computers and new types of furniture and appliances.

Cars will be smaller, sleeker and more fuel efficient—many of them powered by diesel fuel or electricity.

The rush of women into jobs outside the home will create a demand for all sorts of services to help juggle home and business duties.

Instead of paying cash when they shop, consumers increasingly will have funds transferred electronically from their banks to merchants.

Families will be able to shop from their homes, with the help of two-way cable television.

More people, too, will be in a do-it-yourself mood, taking the time to tackle home repairs and other chores rather than pay for high-priced labor.

Self-improvement courses, sports and other leisuretime pursuits will be in big demand, as people enjoy shorter workweeks and earlier retirements.

In medicine, computerized devices will open up the world to the deaf and blind, and a new class of personality drugs will improve memory.

These are just a few of the shifts that will be coming in day-to-day living. For a closer look at how America's habits will change—

## Electronic Homes: Computers Everywhere

No longer an isolated haven where the family lives out its private life, the home is fast becoming a vehicle for bringing the outside world to people's finger tips.

A prime tool in this transformation will be the home computer, which will allow people to figure their taxes, obtain information on entertainment, pay their bills and send messages to relatives and friends.

Such computers already are available for around \$1,000 plus hookup fees and hourly rental charges for use of the telephone lines over which information is sent. However, within the decade, many personal computers will drop in price to \$50 or \$100, and the network of users will grow from a few thousand to millions.

Besides the personal computer, which might be located in the kitchen or den, many family television sets in the late 1980s also will be equipped to serve as complete information centers. With the spread of cable-television systems and communications satellites, hundreds of electronic highways will be created to bring families an almost endless va-

riety of data and entertainment possibilities. Over the TV set, people will be able to call up local and international news, sports results, calendars of local events, restaurant menus and theater schedules. Even sections of magazines and newspapers will be delivered on home screens and, with the proper equipment, families will be able to print out parts they want to save. However, experts don't believe that the screens will soon replace the printed media.

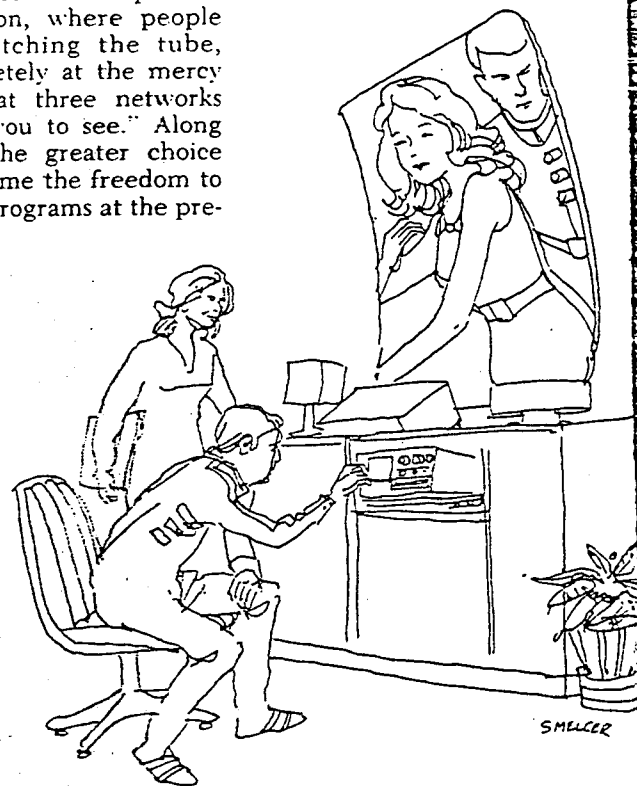
"The newspaper has shape, texture and personality difficult to duplicate at home on a screen or in a home printer," says John Morton, a media analyst for John Muir & Company, a New York brokerage firm. What will happen, he says, is that newspapers and magazines will tailor their products to appeal to specialized audiences and neighborhoods.

France and England already are experimenting with television home-information networks, and soon the Knight-Ridder Newspapers will launch a pilot system of its own, called Viewtron. The equipment includes a color-television set with a built-in signal-decoding device, a telephone that provides access to information in computer banks via phone lines and a hand-held signaler that relays the viewer's requests to the television's decoder.

Says company President Alvah Chapman: "Looking into the future, we think the system could provide an impressive degree of convenience for the American consumer. It is possible that someday people might be able to shop, bank, send messages, do business research, make stock purchases, learn algebra, look up the name of a Nobel Prize winner—without ever leaving the living room."

As for entertainment, the offerings available on television will be multiplied many times over. There will be channels that specialize in sports, children's programs, first-run movies, cultural events, religion, hobbies—almost every interest under the sun. Some cable systems, such as one now in experimental use in Columbus, Ohio, will allow viewers to make comments or ask questions about what they've seen.

"The new technology will increase the degree to which people can exercise choice," notes economist Bruce Owen of the Justice Department's antitrust division. "Nothing can be worse than the present situation, where people sit watching the tube, completely at the mercy of what three networks want you to see." Along with the greater choice will come the freedom to view programs at the pre-



cise time people want. That can be achieved through the use of video-cassette recorders, already on the market for about \$1,000. By the mid-1980s, however, experts say the cost will drop to as low as \$500 for models that are more sophisticated than today's equipment.

Available, too, at cheaper prices and at higher quality will be video discs of movies, Broadway plays, cultural events and other offerings. The discs will give viewers a picture that is far better than anything obtainable over the air, plus stereo sound. An executive with U.S. JVC Corporation, a New York electronics firm, envisions that many families will have an audio-visual room with big-screen television, a home computer, video-disc and video-cassette equipment and quadraphonic sound. Home movies, too, will rebound, with the development of film that can be used repeatedly, in the same way that people now use sound-cassette tapes.

Some housing experts already have begun making designs for special rooms in higher-priced homes in order to accommodate all of these home-entertainment items, particularly big-screen TV. Walker & Lee, a large California real-estate firm, unveiled such a plan earlier this year.

"When gas costs more than a dollar, people will stay closer to home and learn to be satisfied spending more time entertaining themselves," says company Vice President Steve Auld. "The '80s will be the age of the giant home screen."

Telephones also will be more-effective links to the world than ever before. Consumers will be able to push a single button for frequently dialed numbers, have a busy number called back automatically and summon emergency help instantly. Printed telephone directories could become passé, if phones are tied into computer terminals that can retrieve home and business numbers. Such an experiment has just been launched in Albany, N.Y. □

## Appliances: Economy and Sophistication

Refrigerators, ranges, washing machines and other appliances will be much more energy efficient and sophisticated than today's models.

Pilot lights on gas furnaces and ranges will be replaced by electric-ignition systems.

Even the common light bulb will be designed to use a third of the energy it now takes.

One example of new developments is the convection oven, which has been used in commercial kitchens for many years but now is beginning to gain popularity in homes. It consists of a small heating element with a fan that circulates the hot air inside a portable unit plugged into ordinary house current. The oven uses less energy and cooks faster than regular ovens, and predictions are that it will become as popular as microwave models.

Being introduced, too, are ranges with cooking surfaces that use magnetic induction to heat food—again at an energy savings. In such models, the heat is induced by placing a metal pan in the electromagnetic field located below a smooth, heat-free cooking surface, usually made of ceramic tile. When the pan is removed from the stove, a small integrated circuit in the stove's hardware automatically shuts off the current within seconds—eliminating heat loss and reducing the chance for burns. Coming about \$2,000 now, such stoves soon will be in the price range of most families.

Labor-saving small appliances, too, will continue to sell well, catering to the working woman's desire to make the most of her time. Richard Montmeat, an executive with General Electric, predicts that most families will be short on time—not energy.

He adds: "The family meal is a thing of the past. It's going the way of the family breakfast and the family lunch. To provide a variety of meals at various times of day, house-

holds will buy more frozen and other processed foods that can be prepared quickly, especially with the aid of a microwave oven."

William Lazer, professor of marketing and future environments at Michigan State University, believes that the electronic home of the 1980s will be better suited to serve fast-moving families.

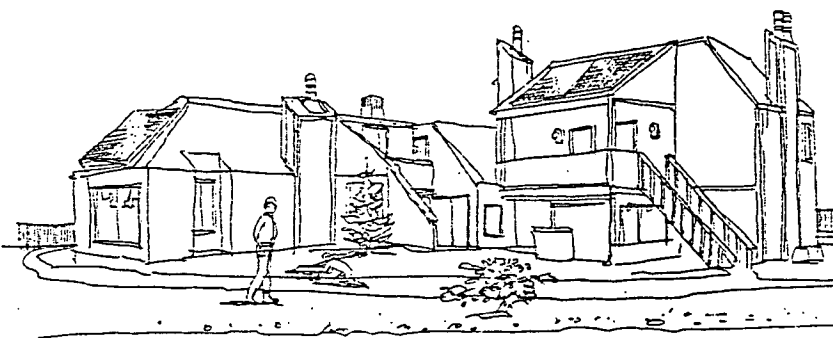
Observes Lazer: "The home will become a filling station for people's needs, a place where parents and children can come and go and have their wants met, without having to depend so much on each other. It'll be a different lifestyle than in the past, but it won't necessarily mean that families are disintegrating." □

## Shelter: Less Room to Grow

On the inside, homes built in the next decade will offer less elbow room than many Americans have become accustomed to having.

To beat soaring costs that are pricing more and more families out of the market for shelter, builders say there is no choice but to offer smaller homes on more modest lots.

New York housing consultant Edward Birkner expects the size of the average single-family home to drop from about 1,600 square feet now to 1,400 by the end of the



1980s. In more developments, there will be four detached homes to the acre, rather than three, as is common today.

Increasing as well in the decade ahead will be even higher-density forms of housing: Townhouses, low-rise condominiums and many varieties of clustered housing—styles suitable for the growing number of single people and retirees looking for smaller, low-maintenance homes. One example is the fourplex or sixplex—big homes that on the outside look like one large mansion but on the inside are divided into four or six separate units.

For people who want the privacy of a detached home but the cost savings of higher density, there will be patio homes that save space by eliminating the large side yards that separate homes in conventional developments. Instead, the homes are clustered around common courtyards or private interior patios.

Even with these steps, the median price of a new home, now at \$64,000, is expected to double by the end of the next decade.

But experts still predict that the percentage of families owning their homes will rise from 65 percent now to about 71 percent by the end of the 1980s. Reasons: Housing's wide appeal as an investment in an inflationary era and the increase in two-income households.

There will be plenty of economizing inside the home, says Guy Odum, president of U.S. Home Corporation, a Houston-based firm that last year started nearly 12,000 homes. He predicts that the formal living room will be eliminated in the average home and replaced by an all-purpose "great room" linked to the kitchen. In other rooms,



folding doors will allow families to have one big room for recreation or two smaller ones when privacy is needed. That concept already is being used in many vacation homes.

Conversation pits, lofts and greenhouse windows also will create a feeling of more space.

Instead of two baths, more homes will have just one, plus a powder room. Another option will be a compartmentalized bathroom with a shower and tub in the center, flanked by a toilet and sink reached by separate doors.

More kitchens will be designed with all appliances on one wall to allow an eating area. Among other prospects: Tables and desk tops that pull out of the wall, leaner cabinets with revolving shelves and other space-saving devices, scaled-down furniture and a revival of the old Murphy bed, which folds into a closet when not in use.

**Solar orientation.** Energy conservation will have high priority. Homes built in the 1980s will be sited to take full advantage of the sun.

Maximum insulation, storm doors and windows and solar-assisted hot-water heaters will be standard in most homes by the end of the decade.

More homes will have computers that automatically monitor heat, cooling, lights and the hot-water system to eliminate energy waste.

There also will be energy meters that will indicate to homeowners the best times to use appliances in order to take advantage of lower off-peak rates charged by utility companies.

More of the home's components will come from the factory. In fact, a strong revival is likely by the end of the 1980s in modular homes—units that are built entirely in the factory and moved to the site, where they are erected on a permanent foundation.

That idea, promoted heavily by the federal government early in this decade, met with a cool reception in many parts of the country, but housing experts say that people will be more enthusiastic about the better styles—and the price savings—that will come with factory-built designs of the 1980s.

In the same vein, most experts see a surge in sales of mobile homes, still priced in a range that moderate-income people can afford.

Mobile-home manufacturers are switching more to doublewide or multisection models that closely resemble traditional homes when placed on a foundation.

The federal government and private lenders also are providing more-favorable financing for mobile-home buyers. Estimates are that by the mid-1980s, more than 500,000 mobile homes will be shipped, compared with about 275,000 last year.

**"No vacancy" signs.** "Far-out types" of shelter—geodesic domes, inflatable houses, underground models—will hold little appeal for the average consumer, except perhaps as vacation homes.

For people who want to rent, however, the years just ahead may present some trying times.

The national vacancy rate now stands at a near-record low of 5 percent, and prospects for additional construction of apartment buildings are no good.

Behind the rental squeeze, soaring utility and maintenance costs on apartments, builder fears of rent controls and the growing number of apartments being transformed into condominiums.

Production of new rental units in the 1980s is expected to average 370,000 annually, a far cry from the nearly 1 million units built annually in the boom years of the early 1970s. The federal government will be counted on to subsidize much of that construction. □

## Travel: Fuel Savings a Must

Parked in the typical family's garage in 1989 will be a small, two-seater electric car for commuting and a diesel van for weekends and vacations.

The average new car at that time will be getting 30 miles to a gallon of gas—many models more than 50 to the gallon.

Big, gas-guzzling V-8 models will virtually disappear and will be replaced by autos with V-6 and four-cylinder engines. Turbochargers—devices that use energy from an engine's exhaust to boost power—also will be common.

Grilles and exterior trim will be eliminated, and headlights, taillights, bumpers and door handles will be recessed into the car's body to minimize drag. Front-wheel drive will provide better handling and more interior space.

In short, says Richard Teague, styling vice president for American Motors, consumers will find more trim, sleek cars and fewer of the boxy models so common today.

More safety features will be built in—air bags, automatic seat belts, additional padding.

The use of gasohol, a blend of 90 percent regular unleaded gasoline and 10 percent alcohol, will be widespread by 1985. Although the expense may be high, autos powered by gas turbine engines that burn kerosene might also be introduced, says G. Garth Leeth, an energy specialist with General Electric's Center for Advanced Studies.

Electric cars, by the late 1980s, will take many commuters to their jobs without the need to charge batteries daily, a drawback with current models that have limited range. Estimates are that 100,000 electric vehicles will be in use by 1985, with General Motors expected to unveil its electric model that year.

For those who like to tinker, the years ahead could bring some disappointment. The technology of tomorrow's cars

## Leisure: No Shortage of Fun

Uncertainty over the supply of energy will alter people's spare-time activities, but there still will be plenty of time for fun.

"People will stay home and spend more time watching television," says Lee Isgur, a leisure analyst with Paine Webber-Mitchell Hutchins, a New York brokerage firm.

Because so many first-run movies will be available at home, movie theaters will have to provide more-sensational visual effects, such as three-dimensional pictures.

Theme parks will become more spectacular, not only for children but for adults as well. One example is a park being built by Walt Disney World in Florida called Experimental Prototype Community of Tomorrow, or EPCOT.

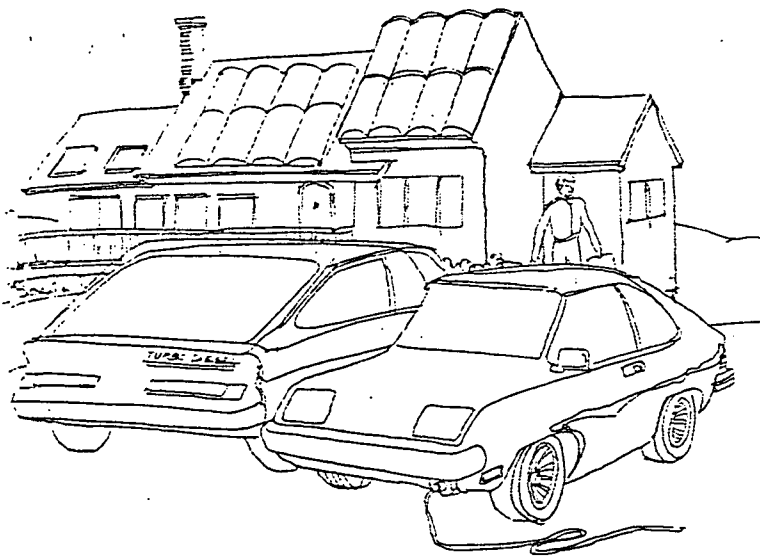
In that park, a food pavilion will show how food can be grown in hydroponic or chemical solutions and in other artificial environments. Other pavilions will offer simulated space rides and solar energy demonstrations.

To save energy, more resorts will offer a wide choice of recreation for a "one stop" vacation, predicts Richard Ragatz, an Oregon leisure consultant. Resorts will be tied in closely with charter-bus and airline services.

The desire of Americans to own a vacation home won't diminish, but high costs will put that dream in jeopardy. Instead, more people will invest in "time sharing" of condominiums, a concept that gives families the use of a resort home for a couple of weeks each year for a one-time payment, which now ranges from \$2,500 to \$10,000.

People will continue to satisfy their wanderlust in motor homes, but the models available will be smaller than today's gas hogs and designed to make the best use of space.

Camping will be popular, too, although people will tend



will be far too sophisticated for most backyard mechanics. Built-in digital computers will monitor ignition timing, the mixture of air and fuel and other vital functions.

Microcomputers also will be incorporated into door-lock systems, dashboard controls and air conditioning. For example, instead of using a key to unlock a car, a person will merely place a finger on the surface of a flat optical reader installed on the door, and the car will be unlocked instantly. Computers also will provide motorists with data on travel conditions and arrival times. □

## Public Transit: More Bargains, Big Crowds

Despite the fuel economy of future cars, the cost of gasoline—\$2 a gallon by 1985—will prompt more families to rely on public transportation for longer trips. Airlines will

be especially popular. The big draw: Cut-rate fares brought on by government deregulation and a mushrooming of charter services.

The surge in business, however, will mean more-crowded airports, parking problems and long waits for baggage. Buses and bus terminals, on the other hand, will be spruced up to attract more higher-income passengers. Theodore Gordon, president of the Futures Group, a Connecticut think tank, looks for luxurious buses with wide seats, as well as tables, cocktail service and stewardesses.

The nation's train system will continue to suffer cutbacks, except in heavily traveled routes, such as the Boston-to-Washington corridor, where revamped roadbeds and 100-mile-an-hour trains will provide fast, reliable service.

As for the traffic snarls in the nation's biggest cities, there's little hope for much relief. President Carter wants to beef up urban mass-transit systems by using part of the revenues collected from a "windfall profits" tax imposed on oil companies. However, it will take years to improve aging bus and subway systems, and the money for new rail networks will be hard to come by. Instead, many cities will try to ease the plight of motorists with computerized traffic control, special lanes for buses and car pools and promotion of "flextime" work schedules to minimize the rush-hour crunch.

Even so, city traffic probably will be more congested. On longer trips, too, people will have to battle an interstate system showing signs of wear in many places. Still, few people will abandon their cars. Says Joel Norman of SRI International, the California-based research group: "The American love affair with the automobile is here to stay until infinity because of the convenience and privacy it alone offers." □

to seek sites that are closer to home. National parks will grow more crowded and, in some cases, people will need reservations just to get in.

Frank Shaw, executive vice president of the Coleman Company, sees a change in the style of camping. "Backpacking is going to give way to family camping," he says. "Members of the baby-boom generation who took up backpacking enthusiastically as young single adults in the late 1960s and in the 1970s now are including their children."

Sports of all kinds will boom. "The rise in spending for leisure is going to outstrip the inflation rate," says Richard Geisler, president of Champion Products, which makes athletic wear.

The typical American already spends about 7 percent of his after-tax income on recreation, and that figure does not include clothing purchased for sports.

Women will become even more active in sports. A poll taken last year by Louis Harris & Associates showed that women account for 46 percent of tennis players, 61 percent of swimmers and 64 percent of cyclists.

For those who like to wager some money while having fun, gambling will become more accessible than ever. In addition to Las Vegas, Reno, Lake Tahoe and Atlantic City, which plan to expand gambling operations, casinos could well pop up in such spots as New York City, Chicago

and Miami. Standard & Poor's, an investment-research firm, reports that gambling is likely to be the "premier growth area in the leisure group."

More genteel pursuits—reading and the arts—will prosper, too, insuring busy times for bookstores, art galleries and libraries, predicts New York psychologist Ernest Dichter. He envisions permanent fairs that will offer movies and many educational exhibits under one roof.

Bargain air fares and faster planes will make foreign travel more popular. Mainland China, Southeast Asia, exotic areas of Africa and the Pacific—even Antarctica—will draw many more visitors.

Restaurants will continue to lure more customers because of the growing number of working women and the additional income generated by two-income families.

Predictions are that, by 1990, restaurants will garner 50 percent of the family food dollar—compared with about 40 percent now.

Leading the way will be the fast-food and moderately priced family restaurants. José Alberni, director of marketing services for Burger King, predicts that fast-food sales will grow by 12 to 15 percent in the early 1980s. He adds that chains will aim next at bringing their hamburgers, pizzas and other products to the residents of smaller communities with populations of 5,000 to 30,000. □





## Shopping: Accent on Quality

When people go out to spend their money, it will be with a lot more caution than in recent years.

Having lived through one decade of soaring prices and with prospects of high inflation throughout the 1980s, families will be wiser and more prudent in their buying habits.

Most experts contend that more families will steer away from wasteful purchases. "Consumers will be more conservative," says marketing professor Robert D. Buzzell of Harvard University, "because their incomes will be growing more slowly."

Companies will be cautious, too, he adds, and will introduce fewer new products—except in the electronics field, which will spawn countless new items. Behind that reluctance to take risks: The rising cost of borrowed funds and the burdens of government regulations.

Much of the new merchandise that is introduced will be designed and packaged for the growing number of single households and small families.

Buzzell expects U.S. manufacturers, taking a hint from America's interest in well-made Japanese and German cars,

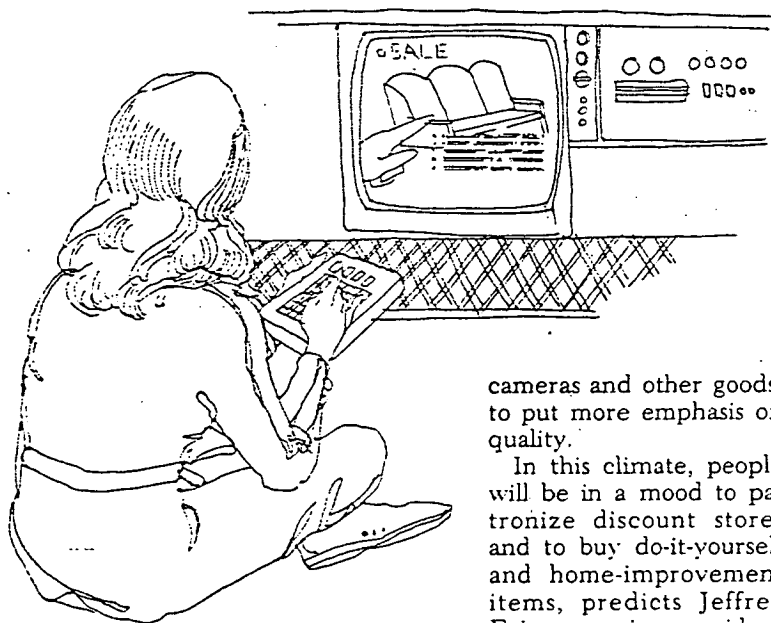
to furnish houses. Sales of baby furniture and children's clothes also will spurt when that same generation triggers a boomlet in births. With tomorrow's increase in condominiums and other small homes, however, lawn-care products and outdoor equipment and furniture won't sell as briskly.

Also predicted: More storefront law offices that handle wills, divorces and other legal requests at lower fees. Opticians and other service firms will locate in shopping malls.

There will be a bigger interest in gourmet foods and foreign-made items, as people become more educated and cosmopolitan in their tastes, says Prof. William Lazer, who teaches marketing at Michigan State University. "People will feel freer to bring the outside world into their home and to be more individualistic in what they buy. Women won't hesitate to mix periods in furniture or to adopt an international flavor in decor."

Department stores, supermarkets and other retail establishments will adopt computer technology for checkout and for inventory control. By the end of the 1980s, more merchants will sell their products by utilizing two-way cable television.

That type of remote-control sales technique will tie in to local banks, which will be moving increasingly toward electronic funds transfer. Under that concept, no cash is needed to buy goods. Instead, a merchant's account is credited automatically when a sale is made—and the same amount is deducted from the customer's account. Similarly, more workers won't get a paycheck, but rather a receipt for wages credited automatically to their accounts. □



cameras and other goods, to put more emphasis on quality.

In this climate, people will be in a mood to patronize discount stores and to buy do-it-yourself and home-improvement items, predicts Jeffrey Feiner, a vice president and retail specialist at

Merrill Lynch, Pierce, Fenner & Smith. He believes that people will continue to buy goods as an inflation hedge—housing and jewelry, in particular.

Also expected: A revival of shopping in stores located in urban areas rather than in far-flung suburbs. The Carter administration currently is moving rapidly toward framing a policy that would try to discourage construction of suburban malls when such projects would do economic damage to downtown areas. In general, merchants will tend to spruce up existing outlets rather than to build new stores.

Says Joel Norman of SRI International: "In the 1980s, I see curtailment of the huge shopping malls and the growth of more smaller centers, plus transit service from outlying communities."

More people will shop at specialty stores that deal in products such as toys, furniture and appliances. New types of stores will spring up to sell and install the sophisticated computers, energy-control devices and other electronic gadgets in tomorrow's homes.

Jack Smallwood, a Worthington, Ohio, marketing consultant, sees big demand especially for appliances and other durable goods, as more of the baby-boom generation begins

## Banking: Automated Services

By using their home computers or television information systems, people will be able to get an instant reading on their bank balances, as well as bills for charge accounts, auto-loan payments and other obligations. If they are in the market for, say, a home-improvement loan, families will be able to do a bank-by-bank comparison, simply by calling up each institution's interest rates on their computer screen.

Automatic-teller machines, located in banks and shopping centers and activated by plastic cards, will make it possible for people to take care of their financial matters without going through a bank teller.

"We'll be seeing a lot more self-service banking," says Robert Long, director of advanced studies for the Bank Administration Institute. "Individuals will be banking by machines of different kinds—home computers, telephones, bank terminals at work. The first wave is coming up like spring wheat right now."

Bank offices themselves will be smaller, with fewer employees. The teller machines will handle routine transactions, leaving the staff free to conduct more-complicated business and to give more personal service to individuals. However, some machines will be programed to counsel individuals on their finances, spewing forth data on retirement accounts, investment strategy and other financial-planning information.

Banking in the 1980s will be largely a one-stop operation, thanks to expected changes in federal and state rules. Instead of keeping savings in a credit union, dealing with a savings and loan association for a mortgage and with a bank for checking, families will take care of all their needs at any one of these institutions. Checking accounts may disappear altogether with the spread of single accounts on which consumers can write checks and earn interest at the same time. Look, too, for a better break on interest rates paid on savings. That gain will result from the scrapping of federal regulations that now keep interest rates well below the inflation rate. □

## Health: A Longer, Fuller Life

The 1980s will see big changes in health care, as Americans live longer and place bigger demands on doctors and hospitals.

A rise in group practices will insure many people of more-specialized attention. Supporting these doctors—many more of them women—will be a team of medical personnel: Physician's assistants, nurse practitioners, social workers and technicians.

Instead of long hospital stays, those with chronic problems will go more often to temporary nursing facilities and outpatient clinics. Dying patients who need professional care will get loving and sympathetic treatment in homelike hospices. The mentally ill also will be treated frequently in the community and at general hospitals rather than being shut away in state institutions. However, that trend will stir controversy because of the shortage of housing for these people and the objections of neighbors.

Medical bills, which have been increasing at an annual rate of 10 percent, will remain a problem and will prompt passage of some form of national health insurance. The program, however, is likely to be a more modest version than the 30-billion-dollar plan advocated by Senator Edward Kennedy (D-Mass.) and others. What is probable is a measure that will cover only catastrophic illnesses. Predictions are, though, that once the program is approved, more-liberal coverage will be added bit by bit.

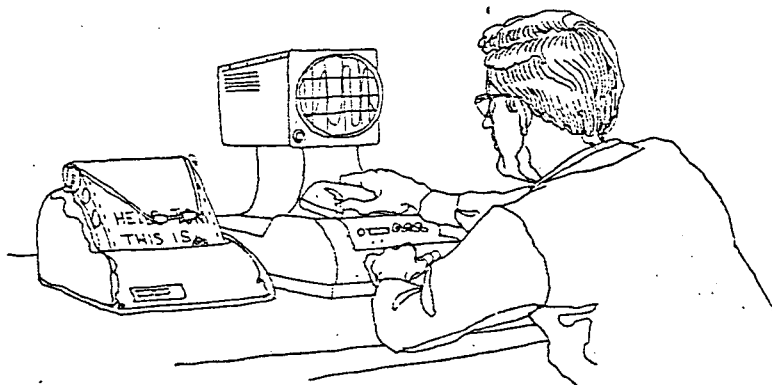
The federal government also will encourage the spread of prepaid health programs in which a single fee entitles a person or a family to an array of services. These plans, known as health-maintenance organizations, are expected to provide 25 percent of the nation's health care by the end of the decade.

A substantial boost in the number of retired peo-

ple will create a greater demand for nursing facilities, drugs, hearing aids, pacemakers and other products. The growing political clout of that group will insure more government assistance for medical care. Theodore Gordon of the Futures Group predicts the development of new personality drugs that will improve memory, attention span and visual ability.

George von Haunalter of the SRI International research group adds that there will be fewer new drugs, but that they will be much more effective. He notes that \$100 worth of pills might be a substitute for \$1,000 worth of hospitalization. Also expected to increase: Self-help courses in first aid and cardiopulmonary resuscitation, as well as exercise programs and campaigns to end the smoking habit.

For the handicapped: Deaf people will be able to use the telephone with the help of a computer inserted in the receiver that will relay a caller's words onto a small screen. The blind will be able to purchase a computer that will write, store and communicate Braille. Handicapped people of all ages can look forward to technological breakthroughs that will allow them to lead happier, more-active lives. □



## Religion: A Spiritual Hunger

Religion is expected to thrive in the 1980s, although some institutional churches may face a rocky road.

Attendance at weekly services, which now amounts to 41 percent of the population, down from a peak of 49 percent in 1958, will at least hold steady in the next few years.

Pollster George Gallup notes that the number of Americans who believe that religion's influence is gaining has tripled since 1970 and that 6 out of every 10 people now describe religious beliefs as "very important" in their lives.

Some scholars predict that church participation will accelerate as institutional religion benefits from what sociologists describe as a spiritual hunger. Others predict that more people will turn to small prayer meetings, such as the

charismatic groups, and to offbeat cults. Michael Novak, a Roman Catholic philosopher at the American Enterprise Institute, sees mainline churches turning away from the "soft-boiled religion and Utopian social views" of the '60s and '70s in favor of traditional messages. There will be a greater cooperation among religious faiths, spurred on by the continuing ecumenical movement and a globe-trotting Pope who will keep religious issues in the forefront. Rather than seek converts from other faiths, pastors and rabbis will focus on the "unchurched" or members of their own religion who have quit practicing.

Peter Berger, a Lutheran sociologist at Boston College, believes that even Eastern religions will have more impact on American religious beliefs. That will result, he says, from improved communications with the rest of the world and a disillusionment with this country's focus on materialism.

Hard pressed to maintain their buildings in a tight economy, some churches—even different denominations—will share facilities. In Protestant churches, more women will join the clergy. Women will press for ordination in the Roman Catholic Church, too, almost certainly without success, although both women and men will have a greater role in services than ever before. In the synagogues, except for the Orthodox, women also will play a larger part.

Whatever way religion turns, observes Rabbi Marc Tanenbaum of the American Jewish Committee, people will be buffeted as never before by fast-changing technology and domineering government. He adds: "The main task of religious people in all denominations will be to mobilize the will of society to assert moral authority over these forces that are now out of control." □



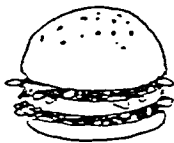
# If Inflation Keeps Soaring—



**PICTOGRAM**

Could a Milky Way candy bar really cost 65 cents? Or round steak sell for \$4.65 a pound in Detroit? Or postage for a letter 40 cents? It could all come true by 1989, if prices keep rising in the next 10 years at the rate they have in the past decade. On this page are examples of prices to expect in 1989, based on changes in the cost of each item or service since 1969.

McDonald's  
Big Mac



Now \$1.00  
1989 \$2.05

Orchestra seat at top  
Broadway musical



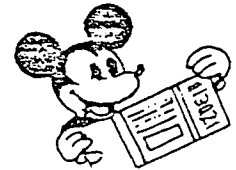
Now \$22.50  
1989 \$45.00

Chicago Tribune,  
1-month subscription



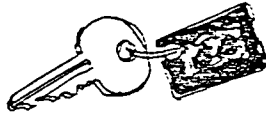
Now \$6.50  
1989 \$11.75

Disneyland  
admission, adult



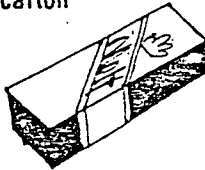
Now \$6.00  
1989 \$10.25

Dallas Hilton,  
single occupancy



Now \$45  
1989 \$127

Cigarettes,  
carton



Now \$5.41  
1989 \$9.35

Notre Dame  
University tuition



Now \$4,130  
1989 \$9,000

New home  
in Denver  
(median price)



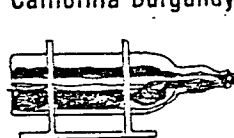
Now \$72,300  
1989 \$149,800

New York-London  
air-coach fare  
(round trip)



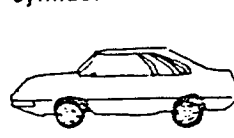
Now \$764  
1989 \$1,390

Bottle of 2-year-  
old Louis Martini  
California Burgundy



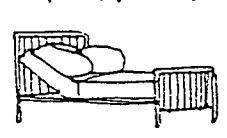
Now \$2.50  
1989 \$4.50

Ford Mustang, 2-  
door hardtop, 6-  
cylinder



Now \$5,882  
1989 \$9,840

Semiprivate room in  
Atlanta's Piedmont  
Hospital, per day



Now \$92  
1989 \$242

# Outlook for Business, Jobs, Profits, Prices

Despite today's recession and runaway inflation, look for better times to move in—assuming that the nation gets its energy house in order.

The country is approaching a more prosperous decade, with less unemployment, the prospect of lower inflation and rising living standards for most Americans.

That is the forecast of this magazine's Economic Unit. Many private authorities, liberal and conservative, agree—even though the economy is presently plodding into a confusing period of recession.

Says Walter Heller, who was chairman of the President's Council of Economic Advisers during the Kennedy administration: "Bad as things are at the end of the 1970s, they will be better in the 1980s."

Prosperity will be slow in coming, with business creaking along in the early years and speeding up in the last half of the decade.

The trends ahead. There will be stumbles, periods of uncertainty, major challenges to be overcome. The price spiral will not end abruptly; energy is not likely ever again to be cheap.

Based on the foreseeable trends,

however, our Economic Unit expects that:

- The increase in prices that people pay, soaring this year at a rate of more than 13 percent, will drift down to 5 percent by 1990. For the 1980s as a whole, the increase will average 6.2 percent a year, not much to cheer about but better than the doubling of prices during the 1970s. Despite inflation, people's real purchasing power—the amount of goods and services that their incomes will buy after taxes are paid—will go up by almost a third in the decade ahead.

- Unemployment, now 6 percent, will first swing up—perhaps as high as 8.2 percent—as the recession bites deeper in coming months. However, the trend will reverse in the early 1980s. By 1990, there will be 16.4 million more people at work than now, and the jobless rate will be about 5 percent.

- Output will surge. The nation's economy by 1990 will be churning out goods and services at an annual rate of 6.1 trillion dollars, more than double the 1980 figure. After the impact of inflation is accounted for, real growth will average about 2.7

percent a year, roughly the same as in the '70s.

- Business profits will increase by 197 billion dollars in the 1980s, almost 40 percent more than the 143-billion jump of the 1970s. Some 80 percent of that will be eaten up by inflation.

No Utopia, but it adds up to a period of moderate but orderly economic growth once business pulls out of the current slowdown. Behind the promising scenario are some fundamental trends.

As the economists see it, most important is a change in the political winds that makes possible an era of business-government cooperation.

Says Albert H. Cox, Jr., president of Merrill Lynch Economics, Inc.: "The groundwork is being laid for a sharply

## Economy—KEY FORECASTS

**Business:** No boom, but strong, steady growth with record profits, less government regulation.

**Incomes:** Most Americans will have more money to spend, despite taxes, inflation.

**Inflation:** Price increases will moderate, dipping to a rate of 5 percent by 1990.

**Jobs:** Unemployment rate will go up early in the decade, then drift downward.

**Output:** Productivity will increase as industry delivers more goods per worker.

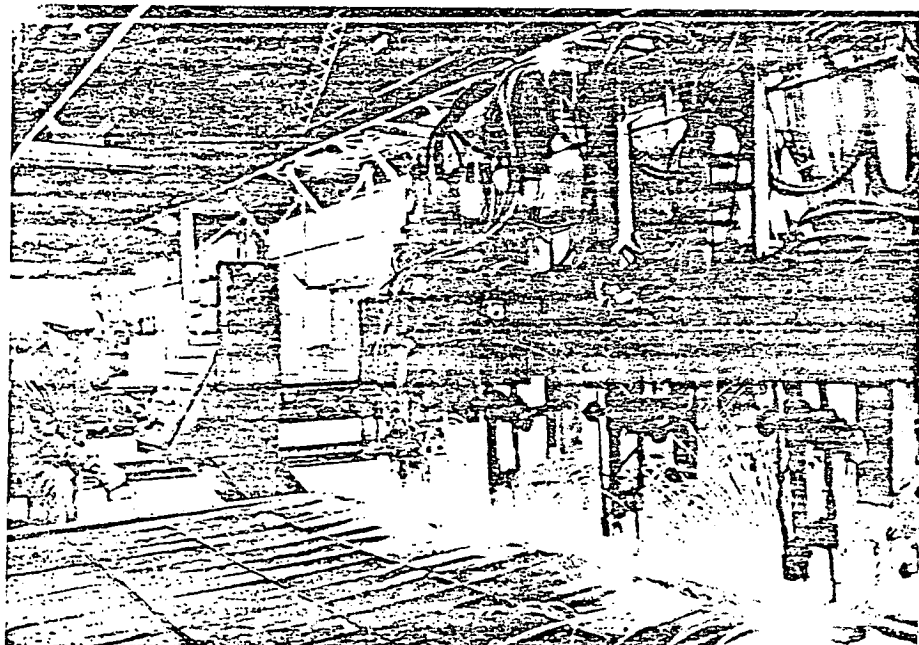
improved economy in the years ahead. Pressures to limit the role of government and the welfare state and to re-establish work and investment incentives are growing."

The key element is the improvement in the investment climate. The Joint House-Senate Economic Committee's 1979 report put top emphasis on the "need to stimulate jobs creating new investment." The bipartisan report said that expanding the capacity of the economy to produce goods efficiently was "the most effective policy to combat the major economic ill of our time—stagflation," the combination of slow growth and inflation simultaneously occurring.

Expert after expert forecasts a spurt during the 1980s in investment to replace antiquated plants and equipment. They expect capital spending to be encouraged by new tax policies, no matter what the political scene is during the period.

At the same time, business will profit from a freer climate. Relaxation of government regulation, a process that already has gotten under way, will pick up speed.

John W. Kendrick, economics professor at George Washington University



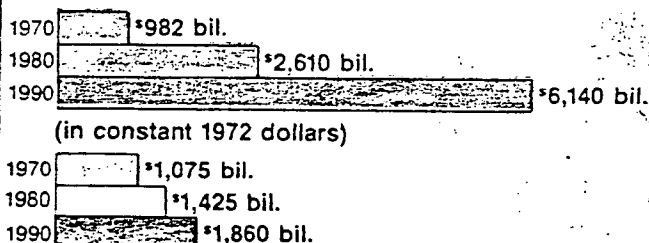
Vast investment in new machines such as this automated, tape-controlled, steel-cutting torch will be needed to modernize industry in the decade ahead.

## Prosperous Decade— 5 Key Indicators

①

### Thriving Business

Total Output of Goods and Services

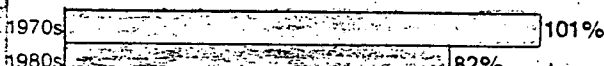


Output, after allowing for inflation, will increase 31 percent in 1980s.

②

### Slowing Inflation

Consumer Price Increases

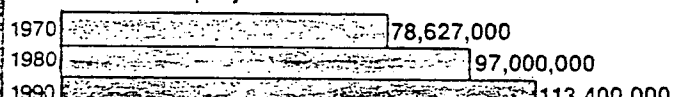


Though still bothersome, price increases will moderate during the next 10 years.

③

### Less Growth for Work Force

Civilian Employment

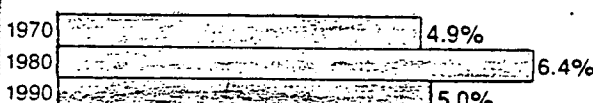


Employment growth will slow to 17 percent from 23 percent in the '70s.

④

### Falling Unemployment

Jobless Rate

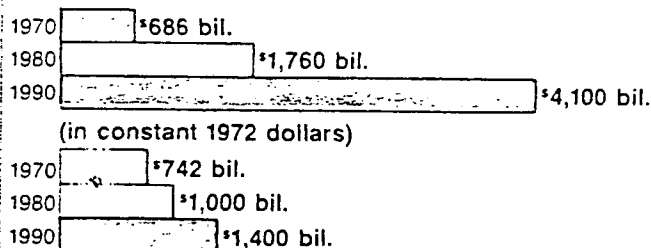


As growth of work force ebbs, labor market will grow tighter.

⑤

### More Spendable Income

Personal Income After Taxes



Thus, taking account of both inflation and taxes, spendable income in U.S. will go up 40 percent—versus 35 percent in 1970s.

USN&WR chart—Basic data: U.S. Depts. of Commerce and Labor, estimates for 1990 and 1990 by USN&WR Economic Unit

in Washington, D.C., notes that the federal government is actively searching for less costly ways to battle pollution and job hazards. He expects "less drag" on the economy from environmental programs in the future.

Another plus for the economy of the 1980s: A change in the population mix. Four fifths of the nation's population increase of 20 million plus will be among persons in their 30s and 40s, the most productive workers and the biggest spenders.

**Boost in productivity.** William Cox, the Commerce Department's deputy chief economist, notes that fewer youths will be seeking jobs, making for a tighter labor market in the 1980s. That is likely to provide added incentive for industries to step up capital investment, to use modern machines to replace scarce manpower.

The Economic Unit forecasts that productivity—output per worker, after factoring in inflation—will grow 1.1 percent a year over the next decade, still low but an important improvement over the seven tenths of 1 percent of the 1970s.

Another plus for business will be a 21 percent jump in households. Put another way, about 42 million Americans during the 1980s will reach 30, the age when many move from apartments to homes of their own.

Most of these newly matured workers are likely to have the means to seek the better life. Many will form two-income families, as more women seek and get jobs.

In the 1980s, more than 10 million additional women between the ages 25 to 54 will join the labor force, making 38 million by 1990. Two-income families will be better able to afford costly items, such as home computers, instant movies, exotic vacations, new cars, second homes.

Our Economic Unit forecasts that the median family income will climb from \$22,000 a year to \$46,000 by 1990. Even allowing for a shrinking dollar, the real increase for these middle-income families will be a striking 16 percent.

Walter K. Joelson, forecasting expert for General Electric, expects that 2 out of every 5 households in 1990 will be "affluent," with money to spend on luxuries. That's almost double the current number.

No leading economist thinks that the road out of the current recession to the sunnier 1980s will be free of problems. A few, such as Jay W. Forrester of the Massachusetts Institute of Technology, foresee the path sliding downward to a depression.

Charles Reeder, chief economist for

# 26 Industries: Which Will Do Best, and Worst

E. I. du Pont de Nemours & Company, does not go that far but he does predict that economic growth will slow down in the next decade, primarily because of the high cost of energy and the burden of environmental controls.

As a result of the upward push of costs, inflation will not come under control in this country until after the next decade, Reeder concludes.

At the root of the uncertainty lie fuel supplies. U.S. oil production now is running about 9.1 million barrels a day. Many energy experts expect production to stabilize at around 9 million barrels a day during the 1980s, despite a massive search for new reserves.

Unless the United States moves fast toward nuclear power, synthetic fuels and other alternatives, they say, foreign imports could jump from the current 8.5 million barrels a day to as high as 20 million barrels by 1990.

The optimistic view is that the American economy will adjust to higher energy costs and tight supply in a few years. Some business economists anticipate that relaxation of governmental price constraints and environmental barriers will result in larger domestic oil supplies and speed the use of coal and other forms of energy.

A shift in odds? Cox of Merrill Lynch says that the odds are growing "substantially" that many of the barriers that are "at the heart of the energy mess" will be removed in the '80s.

One thing is clear: The cost of energy will soar, taking a substantial proportion of everybody's spending money. The prices of almost everything will go up, although not as much as in the 1970s.

As long as the inflation rate remains high, interest rates will stay high, although not at today's record levels. John F. McGillicuddy, president of Manufacturers Hanover Corporation, notes: "Although the price of credit will remain high, I see no crisis in availability."

Will there be enough capital to fund the vast increase in investment needed to modernize American industry, to make it competitive in the world? Probably. Paul W. McCracken, a former chairman of the Council of Economic Advisers, says that lower inflation, resulting from government's budget and monetary restraint, will prompt more businesses to risk money on new projects. He and other economists also are counting on tax breaks to strengthen investment incentives and reduce investment costs and risks.

Thus, say the optimists, the period ahead could become, in banker McGillicuddy's words, "a watershed in the economic and political history of the United States."

Where can you look for fastest growth? Why will some firms have trouble? A special study by the magazine's Economic Unit shows what to expect.

A wide range of American industries, such as makers of airplanes and computers, will take advantage of the coming appetite for products by boosting sales worldwide.

Big winners also are expected to include television broadcasting, aluminum, telephone equipment, machine tools and medical equipment.

But others will have trouble matching the 1980s expansion rate of 2.7 percent a year, beyond inflation's impact, for the economy as a whole. These slower gainers are likely to include such big employment centers as autos and textiles.

For an industry-by-industry outlook prepared by the *USN&WR* Economic Unit:

## Fastest-Growing Industries

Aerospace and airlines. Production will increase 10 to 11 percent a year because of high demand for large transport aircraft such as Boeing 747s

and 767s and Lockheed L-1011s. Airlines, which hope to carry 200 million more passengers in 1989 than this year, will order new jets to replace old ones and to meet noise and air-pollution standards. Total bill: 90 billion for new planes over 10 years. The export market for aircraft will remain strong.

TV broadcasting. Revenues will rise about 11 percent a year. Cable-television customers, now totaling about 15 million, will grow 7 percent annually.

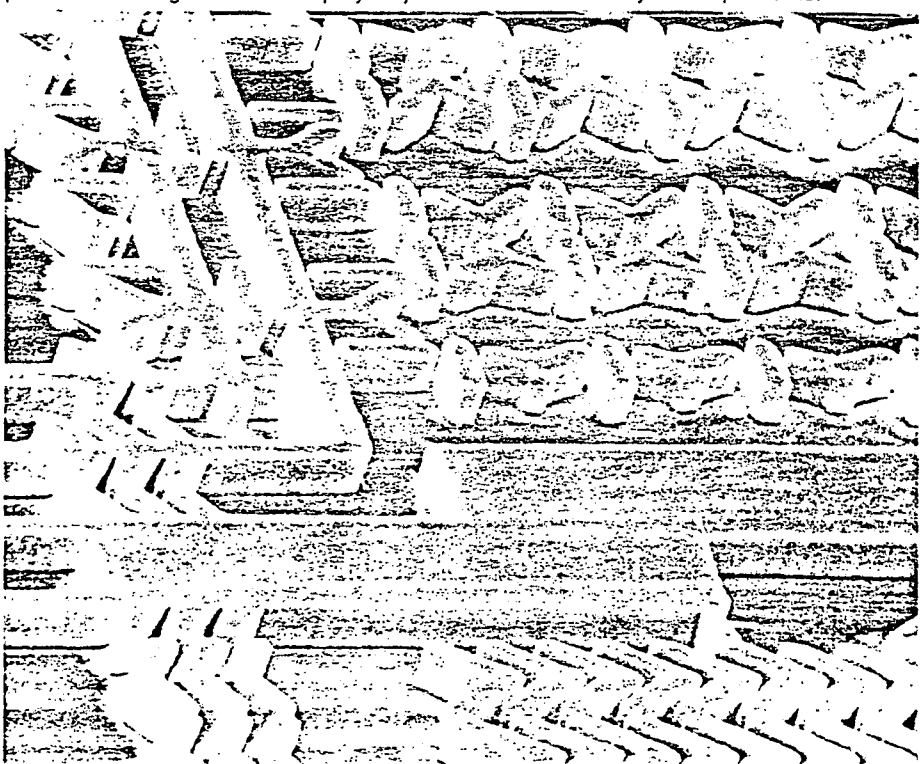
Home electronics. Television-set demand will expand by 8 to 9 percent a year. Video-disc units, home videotape records, electronic games, automobile radios and stereo equipment will become more popular.

Aluminum. Cars will contain more aluminum because it is lighter than steel and thus helps increase gas mileage. More will be used in soft-drink cans and airplanes, too. Industry shipments will grow 5 to 6 percent a year.

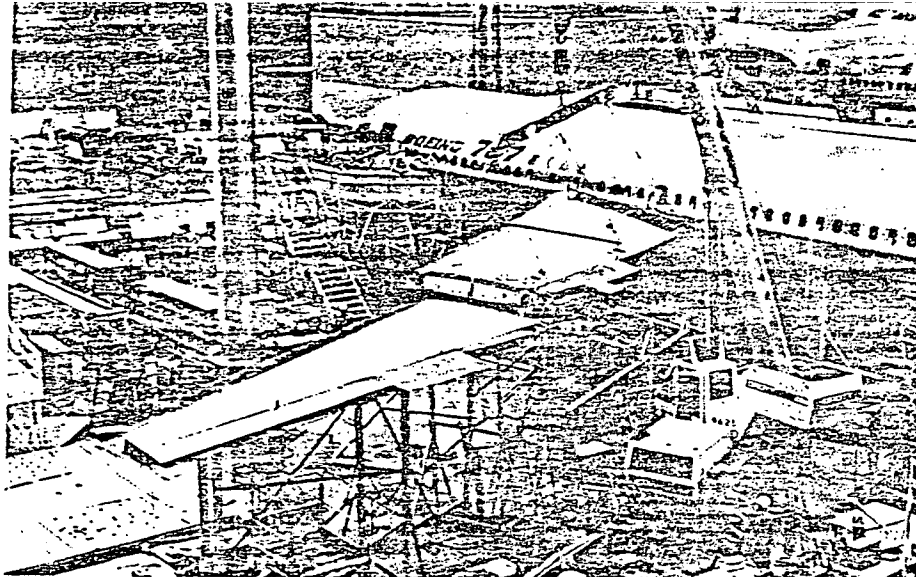
Telephones and telegraph. Foreign demand for U.S.-made communications equipment will contribute to a 9 percent average growth rate. New systems, using laser-generated light waves, are being developed in this country.

Computers, calculators. The indus-

Pattern for the '80s is formed by computer's "bubble memory" unit, greatly enlarged in photo. Such magnetic circuits play major roles in the industry's new products.







New plane in a boom industry—200-passenger Boeing 767—is to be delivered to airlines in 1982. Here, an engineering mock-up is assembled in Everett, Wash., plant.

try expects more homeowners to have small computers to help manage personal finances. Computers will be used for making weather forecasts and discovering oil and gas reserves and ways of conserving energy. Prices will ease as makers of hardware boost productivity. Competition from Japan and Western Europe will intensify, but U.S. firms are expected to take a still larger share of the world market.

**Health care.** Health spending, now about 9 percent of the nation's economic output, will rise steadily as more Americans pass the age of 65. Improvements in treatment of cancer, heart disease, bone diseases and brain disabilities will stimulate demand for more-expensive medical care.

**Machine tools.** Replacement of aging equipment by manufacturers seeking greater efficiency will help the machine-tool industry grow by 8 to 9 percent a year excluding inflation. Aircraft and auto makers will be big customers. Exports should grow.

### Moderate-Growth Industries

**Retailers, wholesalers.** People will not be able to spend a substantially greater share of their incomes on consumer goods and services as long as inflation stays high. A surge in household formation will spur sales of appliances and furniture, however. Specialty shops will attract more and more shoppers. Energy-conscious consumers will trade closer to home and by mail.

**Electronics equipment.** Real growth of 5 percent a year is expected in the industry that produces radar and sonar devices, as well as citizens-band radios and TV-broadcasting equipment. A lot depends on spending by government, which buys half of this equipment. Developments in fiber optics, microprocessors and other fields will boost sales of components.

**Machinery.** The search for oil will spur the need for oil-drilling equip-

ment. Increased reliance on coal by electric utilities will increase the need for mining machinery. There will be less demand for highway-construction machinery but more for road-resurfacing equipment.

**Printing, publishing.** Big-city daily newspapers will continue to dwindle in number, while smaller suburban papers will thrive; more regional editions are likely. Magazines will put out more specialized publications. Many businesses will turn to newspaper inserts and direct-mail campaigns because of rising television-advertising costs.

**Steel.** American steel producers will not be able to keep up with the 2 percent annual increase in demand unless they increase production capacity substantially. The shortage will drive prices up, and much of the slack will be taken up by imports.

**Copper.** The industry will have trouble filling growing orders. New construction and the popularity of solar energy will help increase usage. The shortage will raise costs for cars, housing, television sets, electronic gadgets and other products needing copper.

**Construction.** Building will make average annual gains of 2 to 3 percent, about in line with the overall economy. Work will begin on about 1.8 million houses and apartment units a year—a strong figure but not as robust as in some of the boom years of the 1970s. A potential shortage of mortgage credit could push interest rates even higher than today's. Demand will be strongest in the South and Southwest. More office buildings are likely, but publicly funded construction will lag.

**Pulp, paper.** Mills, which are operating near capacity, will be hard pressed to meet rising demand. Pollution controls and the need for energy conservation will add to the industry's capital-investment costs.

**Chemicals.** Sales will increase 4 to 5 percent a year after inflation, but the

industry faces two big problems: Energy conservation and pollution control. Prices will go up faster than average.

**Mobile homes.** Soaring housing prices will make mobile homes more attractive. Still, the industry will not repeat its 600,000-unit sales rate of 1972. Two problems: Zoning laws and shortage of financing.

**Food.** With food prices likely to climb, more consumers will be bargain shoppers. Growth is expected in so-called "box" stores—no-frills establishments that display a limited selection of food items in their shipping cartons. More frozen and convenience foods will be bought by the growing number of two-income families. Computerized checkouts will spread.

**Trucking.** More fuel-efficient trucks and improved freight handling should improve profits. Deregulation may lead to lower freight charges and more demand for truck services.

### Slower-Growth Industries

**Textiles.** Output of fabrics and fiber will grow a modest 1 to 2 percent a year. Firms are facing stiff competition from imports and more spending to meet health standards in plants. Companies aim to increase exports.

**Railroads.** A growth rate of 2 to 3 percent for freight is forecast. Expanding coal production will help railroads, but most lines will continue to carry low-value products, a hindrance to profits. More passengers are expected to ride trains as carriers add bi-level cars and other new equipment.

**Autos.** The industry will have trouble keeping its profits up while spending to develop and make smaller models with better fuel mileage. Car sales probably will climb no more than 2 percent a year on average. Demand is expected to run fairly strong for light trucks and heavy-duty types.

**Lumber, plywood.** Rising labor, energy and raw-material costs will be a problem. Supplies of reasonably priced timber are scarce. Because of rising plywood prices, builders will turn to particleboard, waferboard.

**Tobacco.** Smoking is not likely to increase any faster than the population does. Health concerns and use of low-nicotine cigarettes are hurting tobacco growers.

**Power equipment.** Energy conservation by business and industry will slow the industry's growth substantially. Electric utilities, which buy power equipment, expect the growth in their peak power load to drop from 7 percent in the 1970s to 4.7 percent in the 1980s. Utilities may increase their orders in the mid-1980s, when new electricity will be needed.

# Exciting Times In Science And Technology

Out of the laboratories are coming advances that point to wide changes in the way Americans live and work—on Earth and in space.

Science and technology in the 1980s will change every aspect of American life—in offices, factories and homes.

During the next decade, the average American will rely far more on computers and other electronic marvels to provide a wealth of information—and to improve the quality of life. Genetic research and computers both will provide new medical treatments, and laser beams will finally come of age in medicine, commerce and industry.

Dramatic alterations are in store for global communications patterns because of advanced orbiting satellites that also will help scientists study the earth's geological formations and oceans—and speed the search for new energy sources. Far-reaching probes will scan the universe beyond the solar system as man looks outward for clues to his own origins.

## Biology and Medicine

Scientists will be creating new products and medicines. For example, computerized electrical devices for restoring hearing and sight to the deaf and blind will become feasible during the 1980s.

Cheap commercial insulin produced by genetic techniques will become a reality too, and advances in X-ray scanning devices will make early diagnosis of once-hard-to-find tumors possible for more patients.

An even newer generation of computerized X-ray machines will allow physicians to obtain color-television pictures of most organs in the body. This diagnostic tool, being developed at the Mayo Clinic in Rochester, Minn.,

even allows doctors to watch the living heart at work.

Researchers are not likely to find the elusive cure for cancer during the decade—but a downward trend in heart disease probably will continue.

Medical research in the 1980s will focus on the human cell as scientists look for new treatments for diseases ranging from cancer to schizophrenia. Researchers now are convinced that clues to the origins of many diseases are locked inside individual cells.

Recent experiments indicate that cancerous cells might trick the body's disease-fighting system by forming a protective cocoon around themselves. If this proves to be true, scientists perhaps could develop more-effective anti-cancer treatments by breaking down such cocoons.

With techniques aimed at turning bacteria into hormone factories, genetic research will produce some miracles in the next 10 years. Included will be large quantities of growth hormones needed by thousands of Americans. Currently the only supply of the growth hormone to treat dwarfism comes from pituitary glands removed from cadavers. It takes 50 cadavers to

Creation of synthetic human insulin, pioneered by researchers Dan Yansura, left, and Dennis Kleid, holds great promise for the 1980s.



## Science—KEY FORECASTS

Home computers: Inexpensive ones will become a reality for many families.

Lasers: Doctors will use high-intensity lasers for cancer surgery.

Medicine: Research will focus on the human cell. Cheaper insulin will become available for diabetics.

Space: U.S. space shuttles will put into orbit a broad range of new satellites for communications, astronomy, research.

Energy: This country's first synthetic-fuel plants will appear.

sustain a child for one year. By the end of the 1980s the genetic technique also will be producing plentiful supplies of insulin required by millions of diabetics to absorb and use sugar.

Test-tube babies will become a common occurrence during the decade as doctors perfect the technique of embryo transfer. The procedure is aimed at helping women whose Fallopian tubes have been removed or are damaged. Also on the horizon: Surrogate pregnancies in which substitute mothers could bear children for women unable to carry a fetus themselves.

## Space and Astronomy

The re-usable, manned space shuttle will be the centerpiece of the U.S. space program in the 1980s.

Scheduled to be launched for the first time in 1980, the first shuttles will be used mainly to place earth-circling satellites into orbit—saving millions of dollars in expendable rockets now used to blast satellites into the sky.

Satellites placed by the shuttles will be able to pinpoint resources on land and under the sea more accurately than can be done today. There also will be a broader range of commercial satellites that will bring a wider selection of television programs and a tremendous improvement to business communication, newspaper publishing, medical diagnosis and disaster relief.

A space telescope, to be placed in orbit in 1983, will provide astronomers with a valuable new tool for scanning the heavens beyond the solar system. Because of its position high above the earth's hazy atmosphere, the telescope will help scientists gaze into parts of the



universe previously beyond the range of man's vision.

One of two unmanned Voyager spacecraft already is on the way to deep space and will hurtle out of the solar system after visiting its outlying planets. The craft contains numerous human artifacts—among them, for instance, a photograph of a woman raking leaves—that could eventually find their way to other intelligent creatures on the fringes of the universe and help tell them the story of the planet Earth.

## Energy

The 1980s will bring important new developments in energy production, including greater use of solar energy in both homes and industry, and the first U.S. plants for making synthetic fuels.

These plants will make liquid fuel from natural gas, petroleum products from coal and extract oil from shale.

The nation also will look to increasingly diverse sources of energy to fuel its plants and automobiles but is not likely to find the final answer to its energy shortage.

There will be more coal production during the next 10 years but the environmental problems of coal will remain. Nuclear plants will increase in number too, with tighter safety standards, but will not contribute a much greater proportion of the nation's electrical supply than they do today.

To keep even with the nation's increasing thirst for energy, controls on domestic oil and gas production will finally come to an end, while the uncertainties of imported oil will continue. Conservation and recycling will become far more active parts of the na-



Dramatic new uses for the laser: Here high-intensity beam is used to check atmosphere for auto emissions.

tion's energy policy and of daily life than they are today.

Fusion, the great energy hope of the next century, will move a step or two closer to reality with the first attempt by Princeton University scientists in 1981 to reach "break-even"—the point at which a fusion reactor puts out as much energy as it requires to run it.

An energy-saving car, powered by an electrochemical process using aluminum, also is in the works.

## Computers and Electronics

More than anything else, the 1980s will be the golden age of the computer—the period in which inexpensive calculating devices and electronic machines become a routine part of American life.

Small home computers plugged into standard television sets, will create still color pictures and graphic displays. These should be fairly common by the end of the decade.

Most striking will be the office of the future. Almost every office worker will be confronted with an ever expanding array of electronic devices and computers that will replace most manual methods of filing, transmitting business information and writing letters and memos.

Products such as these will be possible because of a revolution in electronic technology brought about

by the digital circuit. Already being used in television sets and radios, these tiny circuits, which have become highly sophisticated, create a code of on-off electrical pulses and are the heart of modern computers.

Virtually every tool for the all-electronic office is on hand, and now a number of large corporations are starting to put them together in imaginative ways that will increase the effectiveness of top executives.

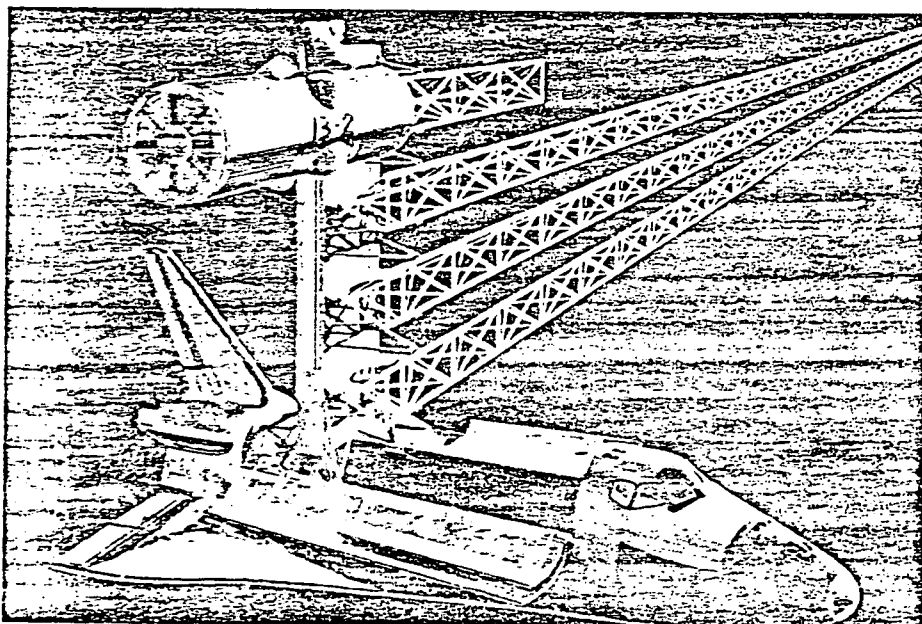
Included in the automated office will be word-and-text processors that compose, edit and distribute business letters, memos and even lengthy contracts electronically. There also will be electronic mail systems to transmit letters and memos on video screens mounted on executives' desks.

The nation's telephone network will become even more sophisticated, with the first light-wave communications system in regular service by the end of 1980. Such systems will carry voice, data and video messages on pulses of light transmitted through hair-thin glass fibers. A 1.5-mile light-wave system in Chicago has already proven surprisingly trouble-free and, unlike ordinary transmission lines, immune to interference from power stations and weather conditions.

In the future, light-wave transmission may be used for regular long-distance service and eventually for transoceanic communication.

Another miracle of the electronic age is computer graphics, a rapidly growing technology that produces not just computer printouts but elaborate maps and graphic displays on video screens.

Such technology, which can display an immense amount of information in a single image, will be used in a wide



Space shuttle, scheduled to be launched in 1980, will be used to construct the solar power station in this drawing. Shuttles also will place satellites in orbit.

range of fields, from cartography and marketing to architecture and movie animation.

## Laser Technology

Lasers, which produce high-intensity light beams that can produce extreme heat or be transmitted over great distances, will become a widespread commercial reality in the 1980s.

Already used in hospital operating rooms for eye and ear microsurgery, at supermarket checkout counters and in some metalworking plants, lasers soon will be used routinely in cancer surgery, sending cable-television signals and transmitting data into computers.

One of the heaviest users of the laser will be the auto industry, where the high-intensity beams already are heat treating and hardening power-steering housings. Advertisers also will use them for skywriting, and discos will create pulsating light shows with multi-colored laser beams.

## Other Areas

Earthquake prediction will become far more accurate during the 1980s as seismologists develop more-reliable tiltmeters and "creepmeters" to monitor the movement of the earth's crust. Geologists also will learn how to predict fairly accurately the eruption of volcanoes.

Mining of the seabed to depths of 3 or 4 miles will become common as treasure seekers search for an estimated 3 trillion dollars' worth of nickel, cobalt, copper and manganese that lies beneath the oceans.

In physics, scientists will move a step or two closer to developing a "unified-field theory" in which most physical phenomena like gravity, electricity and radiation are explained by a single set of equations.

Pollution will continue to lessen in the U.S., but the world's deserts will push outward relentlessly as the hand of man destroys the world's forests and croplands, particularly in underdeveloped countries.

Third World countries also will continue to rely more and more on small-scale, energy-efficient technologies that can stimulate local economies—rather than emulating the expensive technology of the developed world.

Most experts who study the future agree that despite dire predictions of a global decline in productivity and inventiveness, the only real limitation during the next 10 years will be human imagination. Their assessment: The 1980s promise to be an exciting decade in which the frontiers of man's knowledge about his universe are expanded significantly. □

# As the Cities Seek A New Role—

From industrial center to hub of services and leisure—making the shift is the overriding problem facing the nation's urban giants.

Tomorrow's cities—even more so than in the present decade—will be places of sharp contrasts.

Expensive, refurbished townhouses will line streets only a few blocks from the shabbiest slums.

Smart boutiques and sparkling new department stores will cater to commuters and well-to-do residents. Nearby, low-income people will patronize discount outlets and neighborhood mom and pop establishments.

Downtown office towers will be built to house growing service and financial firms, but aging factories will be abandoned as companies seek greener pas-

Minneapolis and San Francisco should all do well."

Success also will depend, says Muller, on whether a city can lure and keep enough upper-income people. Predictions are that enough communities will meet that challenge to spur a healthy revitalization movement in many big-city neighborhoods.

One estimate by the Department of Housing and Urban Development is that more than 500,000 homes will be rehabilitated in cities and in close-in suburbs during the decade ending in 1988. A 1977 survey by the Urban Land Institute found significant housing investment in three quarters of cities with populations of 500,000 or more.

Leading this back-to-the-city movement will be singles, young couples with few or no children and "empty nesters"—older couples who have raised their children. Most of these people will be higher-income professionals working in government, finance and other white-collar jobs.

Among the many neighborhoods that will be transformed in the years ahead: The Logan Circle and Adams Morgan sections of Washington, D.C., Fells Point in Baltimore, Queen Village in Philadelphia, Quincy Market in Boston, Haight-Ashbury in San Francisco, Curtis Park in Denver, the Montrose section of Houston and Coliseum Square in New Orleans.

Observes John Kain, professor of urban economics at Harvard University: "Revitalization has a momentum all its own. When people perceive that things are improving, it often becomes a self-fulfilling prophecy."

The rehabilitation will be aided by expanded funding by financial institutions for inner-city projects. Also leading the way: Federal programs such as urban homesteading, which allows people to purchase government-owned properties for as little as \$1 for the purpose of remodeling them. Similarly, more cities will be starting "shopsteading"—turning over run-down commercial properties to entrepreneurs, a program that already has started in Baltimore.

In fact, some people worry that the

## Cities—KEY FORECASTS

**Population:** Rich and poor will rub elbows.

The number of singles, attracted to the "swinging" life, will increase in cities.

**Neighborhoods:** More will be rehabilitated; old buildings will get new uses.

**Homes:** Will sprout on passed-over land.

**Shopping:** Close-in stores will rebound.

**Offices:** Downtown building booms will be led by financial, service firms.

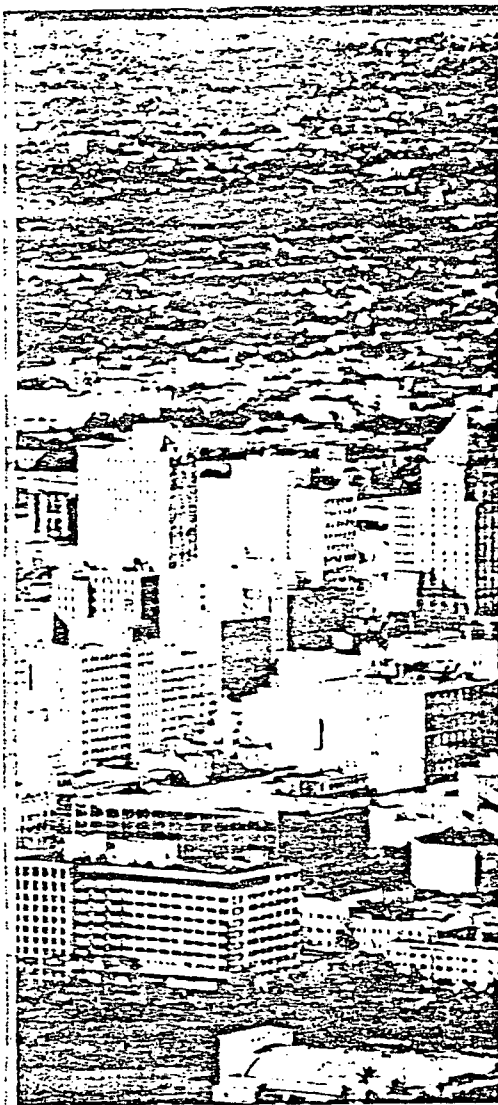
**Industry:** Exodus to suburbia will continue.

**Suburbs:** Can expect slower growth.

tures in suburbs and smaller cities. Hard-pressed Northern cities, hurt by a loss of jobs and population, will compete tooth and nail for federal aid with booming sun-belt communities straining to provide needed services.

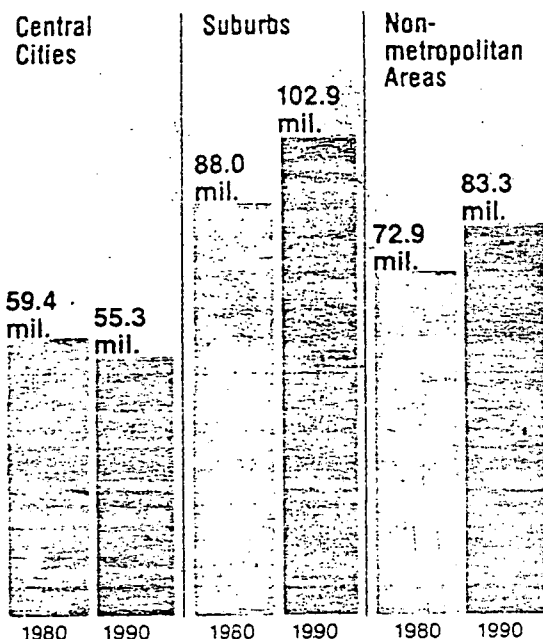
All of this will occur as cities struggle to move from their old role as dense manufacturing centers toward a new image as meccas for services, retail trade and entertainment. Those that are able to make the transition the fastest will be the leading communities of the next decade.

Says economist Thomas Muller of the Urban Institute: "The cities that will do best are those that have something vital going on: Wholesaling, merchandising, banking, tourism. Places like New York, Los Angeles, Chicago, Seattle,



## Flight to Suburbs, Small Towns

Where People Will Live



Proportion of Americans living in central cities will fall from 27 to 23 percent during the 1980s, but rise from 40 to 43 percent in the suburbs. Population outside metropolitan areas will rise sharply, too.

USN&WR chart—Basic data, U.S. Dept. of Commerce; estimates by USN&WR Economic Unit

flurry of activity could force thousands of poor people from low-rent apartments and homes, as owners sell buildings to well-to-do buyers who intend to revamp them. Joseph Timilty, who headed the National Commission on Neighborhoods, says displacement of the poor will be one of the hottest political issues of the 1980s.

That's not to say that cities will become enclaves for the rich—far from it. What they will have is a small but growing population of well-heeled residents living not far from large groups of the poor and elderly.

George Sternlieb, director of the Center for Urban Policy Research at Rutgers University, believes urban centers are becoming in effect two cities. "You'll have the young, swinging city existing cheek by jowl with the older, decaying city inhabited by low-income people."

That "swinging city" will include a host of new commercial projects—stores, offices, hotels, entertainment spots. Among the projects planned or

under way that could revitalize cities:

- Downtown Detroit will have a 225-million-dollar regional shopping mall and two more office towers in the new Renaissance Center.

- Atlantic City, riding the crest of legalized gambling, has unveiled plans for about a dozen casino hotels.

- Chicago is in the midst of one of its biggest building booms, with nine buildings of 24 to 57 stories. Not included in that count is a planned Hilton Hotel that will be the cornerstone of efforts to breathe new life into the north end of the Loop.

- Tampa plans a four-block downtown-redevelopment project bordering on a pedestrian mall—one of several malls that cities will be promoting in the future to battle suburban stores.

- Baltimore will start a 170-million-dollar office-and-residential complex, the largest of that city's many renewal projects. Included will be construction of restaurants and shops in the Camden railroad station, built in 1850, an example of the trend in many cities to

convert old buildings to new uses.

- In downtown Los Angeles, offices, stores and other commercial buildings costing more than 700 million dollars are either under contract or scheduled for construction to start within the next two years.

- Among the many projects in New York City are a 375-million-dollar convention center and a facelift for Times Square.

Other cities expected to enjoy a boom in commercial construction are Denver, Dallas, Houston, Minneapolis, Philadelphia, Phoenix, San Francisco and Washington, D.C.

Also helping to make the downtown outlook brighter, says Muller of the Urban Institute, will be construction of more government buildings in the heart of cities. Last year, President Carter signed an executive order directing agencies to give priority to downtown locations when considering sites for new buildings.

The wave of new commercial attractions downtown will in turn trigger residential building. Predictions are that the concentration of new office-

in Atlanta, for example, will cause the residential population of the central business district to double.

In many cases, cities will put new residential developments on passed-over land and on the sites of old military or industrial facilities. One example: A 200-million-dollar residential complex that Boston plans to build on the site of the abandoned Charlestown Navy Yard in Boston Harbor.

**Stable mixture.** The new mix of well-to-do and poor in the cities could lead to problems, some seers warn, if middle-income families, historically the backbone of urban areas, depart.

But Pierre deVise, an urbanologist at the Chicago Circle campus of the University of Illinois, contends that the trend to smaller households may add to stability. He believes the pattern may keep people in the city longer, as opposed to times past when families tended to move to the suburbs to take advantage of generally better schools.

DeVise says, too, that increased activity downtown—plus worries over

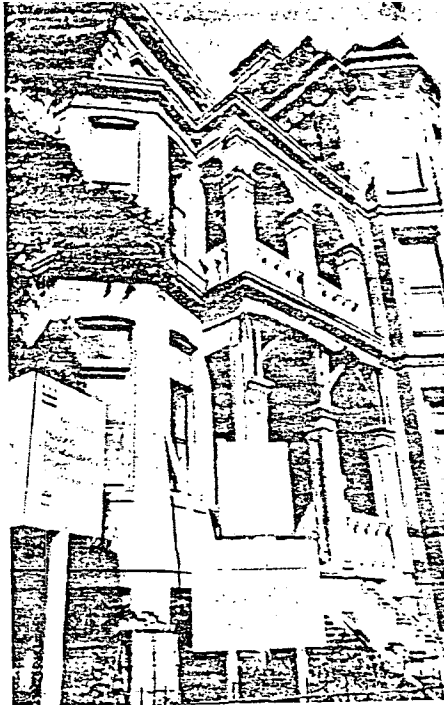
energy and problems in getting utility hookups for new suburban homes—may slow the exodus to suburbia.

As for the suburbs themselves, the older inner-ring communities will take on more of the problems of central cities: Decaying public facilities and growing populations of low-income people—some of them pushed out by redevelopment downtown. Sternlieb, however, believes that these older suburbs will be “rediscovered” because of their good stock of homes.

Within metropolitan areas, families will be less mobile. Soaring home prices and a decade-long shortage of apartments will force more people to stay put. That trend, says urban geographer Peter Muller of Temple University, could lead to more-stable communities—a switch from the traditional pattern of fast-changing suburbs.

Others predict that pressures will grow on the suburbs to lend more fiscal aid to cities. Becoming more common will be the sharing of sales-tax revenues among suburbs and cities and perhaps even a pooling of property-tax revenues—a plan now in effect in the Minneapolis area. States will assume more of the financial burdens of cities, such as funding school systems.

Says urbanologist deVise: “What is



Logan Circle is one of the neighborhoods being revamped in Washington, D.C.

undeniable is that many cities—particularly the aging industrial centers of the North—will face a terrific fiscal crunch in the years ahead, and solutions are running out.”

Federal aid slows. Most cities with populations of 500,000 or more already receive 50 cents in direct federal aid for each dollar in local revenues. However, federal aid is not expected to

grow as fast in the 1980s as in the current decade, when grants to states and localities tripled. As a result, says deVise, some cities will be threatened by bankruptcy. Studies by the Treasury Department show that 10 of the 48 largest cities face fiscal strain.

At the same time, the booming cities of the sun belt—many of them able to expand their geographic boundaries through annexation—will be pushing for a bigger share of the federal funds to meet the needs of growing populations. For example, the metropolitan areas of Tampa, Orlando, Houston, Phoenix and San Diego are expected to grow by more than 30 percent in the 1980s. These newer cities will be characterized by several outlying downtowns or self-sufficient “minicities.”

Says the Urban Institute’s Muller: “The sun-belt communities will continue to have a tremendous built-in advantage. I see nothing that will happen to dampen the dispute between the sun belt and the frost belt.”

Despite the regional rivalries and the worries over finances, urban experts believe that many cities in the 1980s will make progress in their switch from being centers of gritty industry to being magnets for trade and leisure. □

## 50 Biggest Metropolitan Areas in 1990

	1980 Population	1990 Population	Percent Change		1980 Population	1990 Population	Percent Change
1. New York	9,173,000	8,437,000	-8.0%	26. Ft. Lauderdale-			
2. Chicago	7,032,000	7,087,000	.8%	Hollywood, Fla.	980,000	1,550,000	58.2%
3. Los Angeles-Long Beach	7,027,000	7,012,000	-.2%	27. San Jose	1,280,000	1,539,000	20.2%
4. Philadelphia	4,782,000	4,741,000	-.9%	28. Milwaukee	1,435,000	1,467,000	2.2%
5. Detroit	4,346,000	4,258,000	-2.0%	29. Seattle	1,428,000	1,432,000	.3%
6. Boston	3,917,000	3,986,000	1.8%	30. Cincinnati	1,371,000	1,355,000	-1.2%
7. Houston	2,740,000	3,754,000	37.0%	31. Portland, Oreg.	1,168,000	1,355,000	16.0%
8. San Francisco-Oakland	3,210,000	3,314,000	3.2%	32. Kansas City	1,301,000	1,328,000	2.1%
9. Dallas-Fort Worth	2,795,000	3,285,000	17.5%	33. San Antonio	1,082,000	1,318,000	21.8%
10. Washington, D.C.	3,074,000	3,247,000	5.6%	34. New Orleans	1,168,000	1,303,000	11.6%
11. Nassau-Suffolk, N.Y.	2,740,000	2,937,000	7.2%	35. Buffalo	1,300,000	1,252,000	-3.7%
12. Anaheim-Santa Ana-				36. Columbus, Ohio	1,114,000	1,220,000	9.5%
Garden Grove, Calif.	1,970,000	2,731,000	38.6%	37. Indianapolis	1,156,000	1,203,000	4.1%
13. San Diego	1,826,000	2,455,000	34.4%	38. Sacramento	982,000	1,200,000	22.2%
14. Atlanta	1,930,000	2,334,000	20.9%	39. Hartford-New Britain-			
15. St. Louis	2,368,000	2,326,000	-1.8%	Bristol, Conn.	1,058,000	1,082,000	2.3%
16. Baltimore	2,176,000	2,287,000	5.1%	40. Salt Lake City-Ogden	871,000	1,076,000	23.5%
17. Minneapolis-St. Paul	2,065,000	2,170,000	5.1%	41. Memphis	907,000	987,000	8.8%
18. Pittsburgh	2,255,000	2,118,000	-6.1%	42. Rochester	974,000	986,000	1.2%
19. Tampa-St. Petersburg	1,511,000	2,097,000	38.8%	43. Orlando	657,000	951,000	44.7%
20. Phoenix	1,381,000	1,964,000	42.2%	44. Norfolk-Virginia Beach	831,000	942,000	13.4%
21. Denver-Boulder	1,560,000	1,963,000	25.8%	45. Nashville	803,000	922,000	14.8%
22. Newark	1,937,000	1,823,000	-5.9%	46. Honolulu	762,000	921,000	20.9%
23. Miami	1,513,000	1,806,000	19.4%	47. Louisville	889,000	911,000	2.5%
24. Cleveland	1,908,000	1,764,000	-7.5%	48. Oklahoma City	797,000	908,000	13.9%
25. Riverside-San				49. Birmingham	820,000	877,000	7.0%
Bernardino-Ontario,				50. Greensboro-Winston-			
Calif.	1,375,000	1,659,000	20.7%	Salem-High Point, N.C.	794,000	870,000	9.6%

Note: Estimates by US&WR Economic Unit, based on population change, 1970-77.

# "Last Hurrah" for Old-Time Politics?

Parties, candidates, voters—they're all due for new roles in what promise to be tougher, more unpredictable elections of the future.

Politicians in the next decade will be confronted with a new breed of voters—angry, unpredictable and, yet, politically apathetic.

Voters, in turn, will force shifts in political campaigning:

- Candidates, relying less and less on their parties, will concentrate on building their own coalitions. Parties will continue losing influence.
- Minorities and special interests will swing more elections.
- The first billion-dollar election year is approaching, giving a boost to the idea of public financing of elections below the presidential level.
- Advertising, computers and highly paid consultants will dominate more and more political contests.
- Tax saving will spread as an issue, possibly enabling local governments and officials to gain power.

The 1980s, in short, will force old-style politicians and public officials to change in many ways.

As one analyst puts it: "Politicians are going to be looking at larger numbers of voters who are growing older, are moving south, are more turned off and are fiercely independent when they even bother to cast their ballots."

Demographics will be important. Migration and other population shifts will transfer more power to the sun belt after the 1980 census. California, Texas and Florida figure to be the big gainers in seats in the House of Representatives, while New York, Ohio and Illinois are likely to be among the main losers.

The electorate will age. The number of citizens 65 and over will jump from 24.9 million in 1980 to 29.8 million in 1990. The percentage of elderly voters in the overall population will go from 15.5 to 16.7 percent in the decade.

If past performance is any guide, most older voters will be conservative, especially on issues of taxes and government spending. All indications are that they also will be more tightly organized to protect their interests on matters such as pensions, medical insurance and housing.

## Politics—KEY FORECASTS

- Voters will grow older on average, more disenchanted, independent.
- Parties will lose influence to temporary coalitions of voters.
- Candidates will be chosen more on the basis of television appeal, less on experience or philosophy.
- Campaigns will be increasingly dominated by computers, media experts.
- Costs of elections are headed for a billion-dollar presidential year.

Aside from special interests, public apathy will be a problem for politicians of the 1980s. The source of the voter disinterest is traced by public-opinion polls showing that growing numbers of citizens have little confidence in the Presidency, Congress and political parties. The judiciary also is losing ground. Most experts doubt that this pattern of lingering distrust, fueled by revelations in the Vietnam era and Watergate scandals, can be reversed in the next 10 years.

Many analysts also are skeptical that political parties will be able to regain much, if any, of the influence they have lost recently. A Gallup Poll indicates that the proportion of voters who regard themselves as independents has increased from one fourth to one third since 1970.

Experts blame the decline of political parties on efforts to open them up

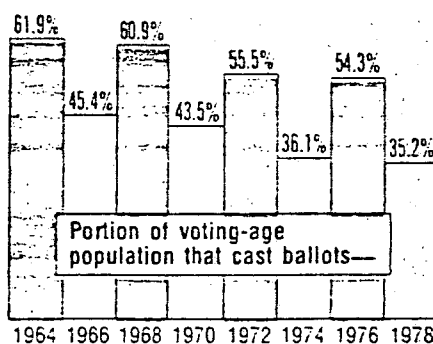
## Winners, Losers in Congress

Based on latest population estimates, here's how the makeup of the House of Representatives is likely to change after the 1980 census—

States to Gain Seats		States to Lose Seats	
California	+2	New York	-4
Florida	+2	Illinois	-2
Texas	+2	Ohio	-2
Arizona	+1	Michigan	-1
Oregon	+1	Pennsylvania	-1
Tennessee	+1	South Dakota	-1
Utah	+1		
Washington	+1		

## Vanishing Voters

Presidential election  
Congressional election



In 1980s, experts fear, there will be a continued drop in voter participation.

USN&WA chart—Basic data: America Votes

## Faded Loyalties

From Gallup Poll surveys of voter affiliation with political parties—

	Democratic	Republican	Independent
1937	50%	34%	16%
1946	39%	40%	21%
1954	46%	34%	20%
1960	47%	30%	23%
1965	50%	27%	23%
1970	45%	29%	26%
1972	43%	28%	29%
1974	47%	23%	30%
1976	46%	22%	32%
1977	49%	20%	31%
1979	45%	22%	33%

In the past four decades, the proportion of independent voters has doubled.



to broader public participation and to reduce the power of a handful of leaders. The unintended result, some analysts say, is that experienced politicians increasingly are being shouldered aside by newcomers who have the ability to wage and win popular campaigns, but who may, after gaining election, lack either the experience or the constituency needed to perform their duties.

Jeane J. Kirkpatrick, a Georgetown University political-science professor, says of the party fracturing: "The process of decomposition has affected both state and national parties, their organizations and their rank and file."

Promising to add to the uncertainty of future elections is the escalating number of presidential primaries, which has jumped from 15 in 1968 to as many as 36 in 1980, as state legislatures grab the chance to gain notice. Some political scientists are concerned that the primary system, designed to take power from party bosses at the nominating conventions, has only transferred it to patchwork bands of activists that can swing a certain primary, but that have little continuity or broad philosophy.

**Special-interest power.** Experts speculate that politicians, unable to rely any longer on party discipline, will concentrate increasingly on building their own power bases. Future candidates of both parties are expected to seek combinations of often-disparate coalitions from among organized pressure groups—without regard to party labels or loyalties.

Office seekers also will be forced in the decade ahead to deal with a growing number of movements focused on one cause. Some of these single-issue groups, such as anti-abortion and consumer forces, are working for recognition as separate political parties, as well as pressuring candidates to stand with them.

Minorities are shaping up as another formidable political force.

Blacks, who accounted for about 7.5 million votes in the 1976 election, say the Democratic Party has taken them too much for granted in the past and promise to be more independent in future elections. Hispanics, members of the fastest growing minority group in the country, already boast significant numbers in the key electoral states of New York, California, Texas and Florida—and warn that they will be demanding more from future candidates who want their votes.

In the next decade, women's groups will be out to better their record of the last five years, in which their number in public office has doubled.

Running for office promises to grow even more expensive and media oriented than it is today. The money spent on elective and party politics at all levels in 1980 is expected to top 700 million dollars, so the nation's first billion-dollar election year may not be far off.

Inflation alone will boost the cost of running for office. As much as 50 percent of future campaign budgets is expected to go for television advertising, a key element in the "packaging" of today's candidates.

**Public dollars.** With taxpayers already paying most costs of presidential campaigning, special interests can be counted on to step up efforts to influence the outcome of Senate and House contests through political-action committees. Controversy over those efforts is certain to trigger renewed attempts in the 1980s to obtain public financing for congressional races.

Analysts predict that the personalized style of political campaigning, tailored expressly for television, will become even more popular. The highly paid campaign consultant, or image maker, will play a bigger role in national and statewide races.

Increasingly, computers will be used to analyze public moods, single out hot issues, target voters and raise money through massive direct-mail appeals. The Republican National Committee in Washington already has 22 employees operating two computers linked to state party organizations. The Democrats, playing catch up, say they have the start of a good system.

The struggle for power and taxing authority between Washington, the 50 state capitals and the nation's urban centers shows no sign of letup in the decade ahead. Tax-cutting fever ignited by the adoption of Proposition 13 last year in California is still catching in many states and is likely to continue at least into the early 1980s.

**More states' rights.** Some analysts see a possibility that public disenchantment with the federal bureaucracy will enable state and local governments to regain some of their lost power as voters try to settle problems closer to home.

But whether they are handled in Washington or at city hall, taxes, inflation and government regulation are seen as the dominant political issues of the next 10 years, just as they have been for most of this decade.

The big difference: Mingled fury and disenchantment on the part of voters and continuing fragmentation of the traditional electoral process promise to make politics in the 1980s a tougher game than ever before.

## How Party Chiefs View the Future

*Leaders of the two major political parties vigorously dispute predictions that their organizations may wither away in the 1980s.*

*In fact, John White and Bill Brock, Democratic and Republican national chairmen respectively, predict in conversations with U.S. News & World Report that the next decade will see a resurgence of parties as instruments for citizen involvement.*

*Here's what the two officials have to say on key issues:*

### Third Parties—

**White:** "Third parties can't win elections. In the past, their roles have been as spoilers or nuisances, and that situation won't change."

**Brock:** "If the two major parties work at their jobs, third parties won't be a threat. We're doing it by ringing doorbells down at the neighborhood and precinct level."

### Special Interests—

**Brock:** "Single-issue groups tend to be negative, with a limited concern aimed at only one issue. We need to keep improving the quality of the regular political parties to deal with the growth of one-issue organizations."

**White:** "These groups have grown because the parties have not fulfilled their duties to take them in. But I'm optimistic the parties can and will respond."

### Problems—

**White:** "We Democrats tore up our party in 1972 to reform it. Some reforms are going to stay, but we're not going to tilt our party to a numerical minority. We're not going to reform ourselves out of business."

**Brock:** "Our party has made a remarkable comeback after Watergate. We suffered then, like the Democrats did over Vietnam. We've upgraded the quality of our candidates, and that brings out more workers and volunteers."

Looking ahead, Brock sees the Republicans' future as "fantastic because we're going back to the basics." White predicts that the Democrats "will remain the majority party because we can respond to people issues."

# Family's Chances Of Survival

A difficult decade lies ahead for the nation's households. Major adjustments will come, but in the end, families are expected to endure.

The American family, buffeted on all sides over the past 20 years, will continue in ferment during the decade ahead. But change is more likely to be marked by evolution than revolution.

Trends that already have transformed families will persist: Movement of mothers from home to job, a high divorce level and a low birth rate.

In the next 10 years, more people will decide against marriage as social pressures to wed diminish and women find it easier to achieve economic independence. Still, most Americans will marry, many not before their mid-20s.

The size of the average family will dwindle as many couples choose not to have children or to have only one or two. Among the reasons: The high cost of raising youngsters in an inflationary era and the growing importance of careers to women.

Children increasingly will be cared for outside the home as millions of new mothers enter the work force.

With the divorce rate remaining at or near record levels, at least in the early part of the decade, many of these children will end up in families headed by only one parent. Demographers estimate that 45 percent of infants born in 1975 will live in one-parent families for at least part of their childhood.



One-parent families will be commonplace as the divorce rate stays high.

Some social scientists fear that rising divorce rates, declining birth rates and the rush of women into the job market represent a serious threat to the survival of the traditional family in the '80s.

Most experts, however, hold the view that despite stresses and strains the family will manage to adapt, as it has throughout American history.

**A key change.** Where once the typical American family was composed of father, mother, children and grandparents living and working together in an agrarian setting, today the shape and living situation of the family are very diverse, reflecting society's gradual acceptance of varied lifestyles.

In the decade ahead, unconventional living styles will increase in popularity. The number of unwed people living together may double from the present 2.3-million level. Princeton University demographer Charles Westoff also sees an expansion of communal living as unrelated people at all age levels band together to reduce housing costs.

More people will also live alone, often by choice and sometimes by necessity—the result of the death of a spouse or a divorce.

Most who divorce eventually remarry, but a growing number are not doing so or are taking longer to make up their minds. Demographer Westoff says that as women move closer to economic equality with men, one of the primary rationales for marriage is eroded. One Bureau of the Census study projects that unmarried people living together and people living alone will account for 30 percent of the nation's

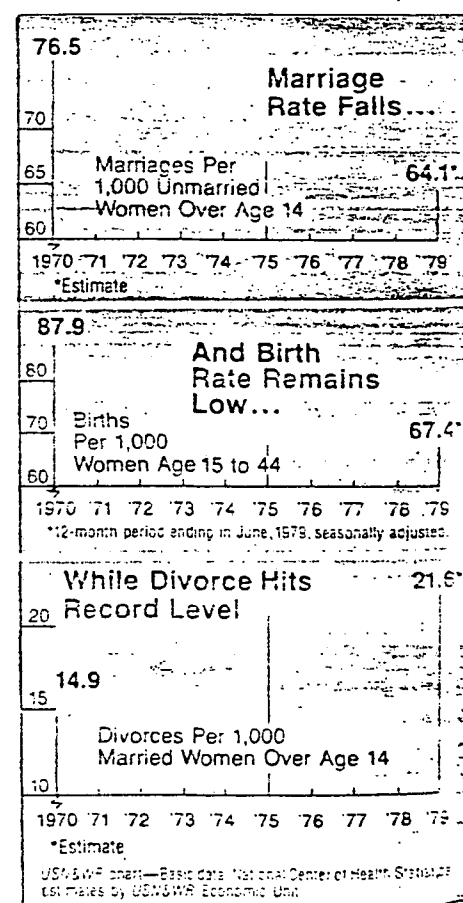
households by 1990—a 20 percent rise over current levels.

Experts contend that living together gives couples a chance to see whether their relationships are sound before they get entangled in marriage. As living together increases, some analysts expect a dip in the divorce rate in the latter part of the '80s.

Although most experts are fairly confident in their predictions, they warn that economic conditions could change the picture. If times are hard, the marriage rate may drop and the birth rate fall even more than expected. But if the nation enters a period of economic boom, people are more likely to marry early and to have larger families.

One group of scholars at the Wharton School of the University of Pennsylvania even anticipates a baby boom. But most experts contend that the economic and social forces behind the decline in the birth rate are so powerful that there will be no major change. They note that the birth rate has been in steady decline for almost 200 years, with the exception of the baby boom after World War II. Some even predict that the birth rate will drop so low in the years ahead that the government may have to offer financial incentives to encourage parenthood.

Many of the changes predicted for the American family in the '80s will



## Families—KEY FORECASTS

**Marriage:** More stress as husbands and wives struggle with new roles. Millions will choose to live together without marrying.

**Divorce:** It will remain high; people will wait longer before remarrying.

**Mothers:** They'll spend more time at work on the average than they do now.

**Fathers:** Pressure will mount to devote more attention to household tasks.

**Children:** Almost half will live with only one parent during part of their early years.

# Whatever You Want, a School Will Teach It

have profound consequences. Mary Jo Bane of the Harvard Graduate School of Education says that in the next decade women, many of whom now work solely for financial reasons, will be more career oriented. This will further alter the way women divide their time between home and job. The upshot: Added stress in marriage.

With more parents of small children working, added pressure to expand day care will develop. Bane says that as more families have only one child, nursery schools and day-care programs will play a key role in teaching youngsters to deal with each other.

**New requirements.** A study by the Urban Institute, a Washington, D.C., research group, says that by 1990 there will be a 64 percent jump—from 5.3 to 8.7 million—in the number of working mothers with children under 6. This is likely to lead to demands for more flexible working hours and generate pressure to permit employed parents to take sick leave when children are ill. Business will also be asked to pay new attention to developing part-time jobs.

These changes would enable parents to juggle home and job responsibilities more easily. Experts are concerned that if there isn't greater flexibility in the workplace, growing numbers of youngsters will be left on their own, leading to delinquency problems.

Fathers, who only gradually are sharing housework and child rearing with working wives, are expected to assume a larger role at home. This could alter the workplace dramatically.

Paul Glick, senior demographer at the Census Bureau, says that "during the next decade or two, social pressure may be expected to diminish for both a working mother and her husband to be employed on a full-time basis."

As the number of one-parent families remains high, with many at the poverty level, efforts will mount to tailor federal programs to their needs. Some analysts fear that this could lead to fierce intergenerational conflict, as advocates for poor youngsters battle the growing elderly population on Social Security for scarce federal dollars.

The problems facing the family are of such widespread concern that President Carter is sponsoring a White House conference on the subject next year. Jim Guy Tucker, chairperson of the conference, hopes that the series of meetings will lead government and the private sector to "develop more family consciousness."

Despite the pressures from economic and social forces, however, experts argue that most families will adjust. Says Harvard's Mary Jo Bane: "American families are here to stay." □

**Innovations will spread; pressure for higher standards will grow as educators seek to cope with changing times and sliding enrollments.**

Schools in the 1980s will try methods never before attempted in an effort to recover ground lost in recent years.

Among the pioneering prospects:

- Training students in biofeedback techniques to put them in a frame of mind that's most receptive to teaching.

- Experimenting with drugs that enhance brain function and memory to aid both slow learners and advanced students.

- Simulating real-life social situa-

Why this surge in adult students? Mainly, an expected sharp increase in demand for highly educated workers. Needed will be such talents as computer literacy, scientific and mathematical sophistication and the capacity to adjust rapidly to changing technologies—characteristics not found widely among older workers educated years earlier.

Increasingly, this continuing education will be almost compulsory in many fields—particularly for professionals and others subject to state licensing.

Demographic changes will affect elementary and secondary schools, too. From kindergarten through eighth grade, the number of students will keep sliding and then begin to spurt upward about 1985, bringing the total to nearly 34 million pupils from today's 29 million.

The story will be different in high schools, where enrollments will be 2.5 million lower at the end of the '80s than at the beginning.

Social forces will encroach on the classroom. Nursery schools—both public and private—will swell as more mothers take jobs. Enrollments already have tripled since 1968 and could include at least half the nation's 3-to-5-year-olds by the early '80s. In many places, such day care will go beyond baby-sitting and attempt to enrich and develop children's intellectual abilities.

Public education will be asked to serve increasingly specialized groups of students, ranging from the mentally and physically handicapped to immigrant and bilingual students.

Another headache for school officials will be the likelihood of a severe teacher shortage by the mid-1980s. Enrollments in teacher-training institutions have declined steadily, so as older teachers retire or quit, there will be fewer available to replace them.

Public education also will get a stiff challenge from private and proprietary schools, which will grow dramatically. Another boost may come in some form of tuition relief, either as tax credits or "voucher" programs that will pay tuition with public funds. Both ideas are forecast to gain wide acceptance by the middle of the next decade. In addition, as a fringe benefit, many compa-

## Schools—KEY FORECASTS

**Enrollment:** Kindergarten through grade 8, lower until 1985, then up; high schools, down; colleges, off—many will close.

**Innovations:** Biofeedback and holography will be among new ideas tried out.

**Adults:** More adults, women, part-timers will take university classes.

**Teachers:** Shortage by 1985; tenure will be abolished at many colleges.

**Testing:** National competency exam, higher test scores are likely.

tions in the classroom—such as marriage or workplace conditions—that will prepare students for life after they graduate.

- Increasing use of computerized devices, teaching games and video technology that can instruct students both at school and home.

- Using holographic projection and satellite links that re-create faraway places—for example, letting students tour the Smithsonian Institution or the British Museum from the classroom.

**More older students.** Education's one boom field in the '80s in an otherwise slow-growth decade will be in schooling for adults.

As many as 4 out of 10 college students will be over 25 years old, many of them part-timers already embarked on careers. Retirees and other adults will attend noncollegiate training programs designed for self-improvement or job switches.



# No Easing of Workplace

Women, blacks, Hispanics and other restive groups will be stepping up their drive for advancement. Unions stand to gain in a time of agitation.

The 1980s will be a decade of unrest in the American workplace as millions of educated, ambitious workers compete for the top jobs.

Women, minority-group members, the handicapped, the elderly and even illegal aliens will contribute to the turmoil by demanding special privileges from their employers.

Technology will play its part by upsetting the present occupational mix. Many factory jobs will be lost to automation, and employment will grow in white-collar fields. Computers will create a "paperless office," and some workers may lose their jobs to robots.

Unions are likely to prosper. Labor leaders anticipate an upswing in union membership over the next 10 years, particularly among office and professional workers. If so, many unsuspecting employers of white-collar staffs will experience their first labor strikes.

**Role for workers.** Employers themselves foresee a decade of experimentation with new labor-relations techniques designed to give workers a bigger role in companies and more flexible working schedules. These include "flextime," job sharing, longer vacations and the four-day workweek.

Throughout the American workplace, according to Carnegie-Mellon University economist Arnold Weber, the 1980s will be "a time of increased tension and potential conflict among the various groups in the labor force."

The 1970s will be remembered by labor economists for unprecedented labor-force growth, plus high unemployment. Swelled by the generation born after World War II and by the rapid influx of women, the work force expanded by about 2 percent a year. Unemployment averaged about 6 percent during the 1970s.

Population statistics show that this wave of new job seekers will subside by the mid-1980s to an annual growth rate of 1 percent. With fewer young people entering the work force, unemployment will decline—even among black teen-agers.

At the same time, more than half the

nies will offer to pay tuition of employees' children at private schools.

Another prospect is schools run entirely by private corporations to train their employees; some companies already are doing so. Harold L. Hodgkinson, former director of the National Institute of Education, predicts that by 1984, 300 major corporations will have their own degree-granting units that teach students not only technical skills but also such fields as writing, mathematics, art appreciation and history.

**Let Washington pay?** All of these changes will subtract further from the already shaky financial base of local schools. Public disenchantment with schools and the revolt against high local taxes will spur efforts to get Washington to pay more of the costs of public education.

One suggestion that some states will adopt is to abolish compulsory education for some youths below the age of 16, thus reducing financial pressures.

For higher education, the '80s will be perilous. Enrollments will decrease 10.7 percent, from 12.4 million in 1980 to about 11 million in 1988. During the decade, as many as 300 colleges will close, mostly private and small state institutions lacking ample endowments.

"I can foresee that sometime in the early 1980s there will be a year in which there is an average of one college closing per week," predicts Robert Behn of Duke University's Institute for Policy Science and Public Affairs.

To survive, many colleges will have to give new stress to career training in an attempt to lure older and part-time students.

One inevitability: The tenure system that gives faculty members more or less permanent jobs will be abolished

at many colleges. Universities' professors then will be hired under long-term, renewable contracts.

**\$20,000 plus.** College students will be hit in the pocketbook. Average annual costs for private university tuition, room and board will rise from around \$5,000 today to more than \$10,000 by 1985. For prestigious schools, costs could be more than double that sum.

Most school and college administrators believe that the quality of instruction may be better than at any time since the mid-1960s.

Demands will continue for a boost in standards. A national achievement test—designed by the federal government for use as a model by states in minimum competency examinations—is predicted by many educators.

After years of experimentation and disappointment with new teaching methods, "back to basics" will continue to be the watchword in many of the classrooms. There will be room for educational innovations such as bio-feedback techniques, computers and holography, but teachers and parents are going to take a show-me stand before embracing them.

Still, students and parents will see some marked change in traditional concepts of schooling. The all-purpose classroom, for example, will no longer be the major learning site in many schools. Students will spend more time in specialized "resource centers" and in computer-terminal booths. Tutored videotape instruction will allow many students to finish course work without ever leaving their living rooms.

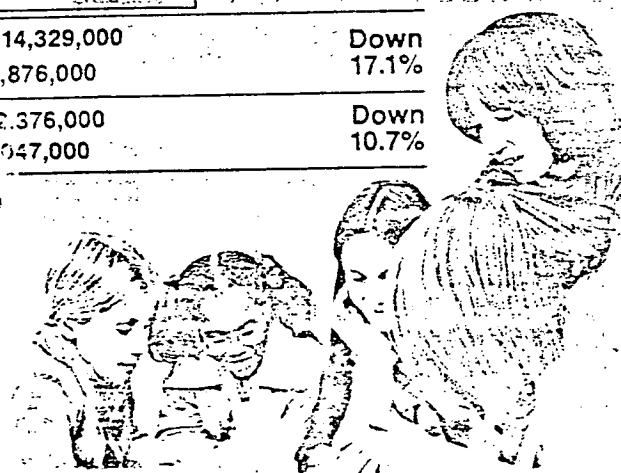
Thus, despite the leaner times ahead for schools in the coming decade, there is hope for better instruction—from the cradle to postretirement years. □

## School Enrollments—a Look Ahead

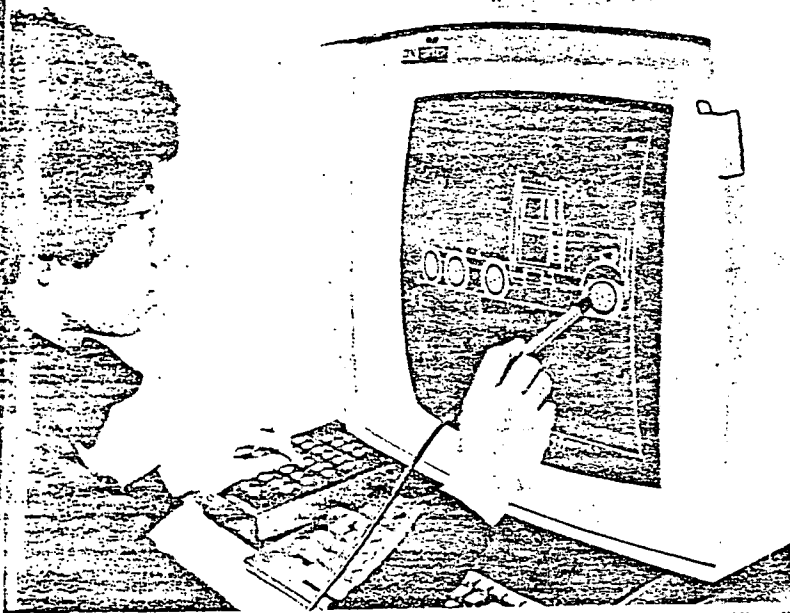
Preschool (age 3-4)	1980	2,009,000	Up 28.1%
	1990	2,574,000	
Elementary (grades K-8)	1980	29,796,000	Up 13.7%
	1990	33,871,000	
High School	1980	14,329,000	Down 17.1%
	1990	11,876,000	
College	1980	12,376,000	Down 10.7%
	1988*	11,047,000	

\*Latest projections

USN&WR chart—  
Basic data:  
National Institute  
of Education,  
U.S. Dept.  
of Health, Education  
and Welfare



# Women in the



Computers will dominate tomorrow's "paperless office."

working population will be between the ages of 25 and 44 by mid-1980. Experts fear an intense struggle will develop as nearly 60 million workers in this age group try to scramble up the corporate ladder.

Harvard University economist Richard B. Freeman says that workers age 25 to 44 will meet "fierce competition for promotions, coupled with substantial career disappointment." Top salaries will erode, too, as more people compete for them.

Says Freeman: "The 'excessive' number of 25-to-44-year-olds and the shortfall of younger workers will create major personnel and labor-relations problems, on whose effective resolution industrial peace in the 1980s may depend."

Adding to the pressure for top jobs may be the increased reluctance of retirement-age workers to step aside. More older workers may delay retirement as a result of longer life expectancy, inflation and legislation prohibiting discrimination against older workers. Already in effect is a law banning mandatory retirement before age 70, and its principal sponsor, Representative Claude Pepper (D-Fla.), now vows to outlaw forced retirement at any age.

Women and blacks, still confined to a limited number of job categories, will spread further through the economy as their numbers grow. The Bureau of Labor Statistics predicts that 23 mil-

lion women and blacks will enter the work force in the next decade, compared with fewer than 8 million white men.

But women and minority-group jobholders will not achieve a share of the top jobs equal to their numbers. By 1985, according to government projections, blacks will account for about 12 percent of all workers, but they will hold only 3.5 percent of the management jobs. Although women will comprise nearly half of the work force, they will hold far less than half the jobs in many desirable occupations.

**Two hurdles.** Joan Goodin, executive director of the National Commission on Working Women, says the "double burden" of job and family will put women at a severe disadvantage in an era of intense competition for promotions. She fears that the clerical skills of many women will become obsolete as

word-processing systems reduce the need for typing. "Women are being trained for the jobs that will be eliminated," she says. "It's a great hoax."

Actually, some futurists expect word-processing machines to help upgrade the role of clerical workers. "The secretary will become a stylist, an editor involved in production," says Jean Paul Emard of the Congressional Research Service's science-policy-research division. "It will take the mundane routine of typing out of the typing pool."

For low-wage workers, economists foresee increased competition between illegal aliens and minority-group workers. The current influx of illegal immigrants, mostly from Mexico, the Caribbean and South America, is expected to go on unabated in the next few years.

Labor Secretary Ray Marshall predicts that Hispanics will foment a new civil-rights movement in the 1980s unless these aliens are permitted the rights of citizenship.

With women, minorities, aliens, handicapped workers, veterans and many others seeking preferential treatment in the work force, Weber predicts that a backlash against affirmative-action regulations will continue to grow. "This is why affirmative action is becoming so terribly controversial," he says. "How can you have a labor-market system in which everybody has the right to go to the head of the queue?"

Few workers have been unaf-

## Changing Work Force

### Big Influx of Women...

Women in Civilian Work Force

1970	31,520,000	Up 23% in 1980s
1980	44,000,000	
1990	54,300,000	

### And Nonwhites...

Nonwhites in Civilian Work Force

1970	9,197,000	Up 25% in 1980s
1980	12,500,000	
1990	15,600,000	

### But Slower Growth Among Men

Males in Civilian Work Force

1970	51,195,000	Up 9% in 1980s
1980	59,600,000	
1990	65,100,000	

The proportion of women seeking work will rise from 51 percent in 1980 to 57 percent by 1990. But for men, the participation rate in the work force will fall slightly, to 76 percent—largely due to earlier retirements.

USNA/R.A. Chron.—Basic data: U.S. Dept. of Labor, 1980 and 1990 estimates by USNA/R.A. Economic Unit.

## Work—KEY FORECASTS

**Labor force:** More than half will be ages 25 to 44, heating competition for promotions.

**White-collar jobs:** Openings will grow faster than for factory jobs.

**Unions** will organize more office workers.

**Work time:** Job sharing, "flextime," part-time work will spread; more days off.

**"Paperless office"** will be created.

**Women**, as well as blacks, the handicapped, aliens, others, will demand more promotions.



## Where Jobs Will Be in 1980s

Based on a survey by the Department of Labor, these are latest estimates of job prospects in numerous occupations. The number of average annual openings takes into account growth and replacement needs. But the projections do not include openings caused by promotions or transfers.

	Latest Employment (1978 estimate)	Average Annual Openings to 1985		Latest Employment (1978 estimate)	Average Annual Openings to 1985
<b>ALL OCCUPATIONS</b>	<b>94,373,000</b>	<b>5,100,000</b>	<b>BLUE-COLLAR OCCUPATIONS</b>		
<b>WHITE-COLLAR OCCUPATIONS</b>			Assemblers	1,164,000	70,000
Accountants	975,000	51,500	Bricklayers	204,000	7,500
Airplane pilots	69,000	4,100	Carpenters	1,253,000	67,000
Architects	69,000	3,100	Electricians	590,000	29,600
Bank clerks, tellers	617,000	57,000	Factory inspectors	736,000	52,000
Bank officers, managers	573,000	28,000	Foremen	1,671,000	79,000
Bookkeepers	1,830,000	95,000	Forklift operators	363,000	14,600
Cashiers	1,403,000	92,000	Gas-station attendants	416,000	14,800
Chemists	118,000	6,300	Laborers, construction	953,000	40,000
Computer operators	393,000	6,500	Locomotive engineers	54,000	2,400
Computer programmers	247,000	9,700	Machinists	493,000	20,000
Dentists	117,000	4,800	Meatcutters	204,000	4,900
Drafters	296,000	16,500	Mechanics, aircraft	132,000	5,200
Economists	118,000	6,400	Mechanics, auto	1,024,000	32,000
Engineers, aerospace	59,000	1,500	Mechanics, auto-body	184,000	6,000
Engineers, civil	160,000	8,900	Mechanics, heating and air-conditioning	210,000	17,400
Engineers, electrical	329,000	12,800	Painters, construction and maintenance	484,000	27,000
Engineers, industrial	206,000	10,500	Plumbers, pipe fitters	428,000	30,000
Engineers, mechanical	216,000	9,300	Printing compositors, typesetters	181,000	3,600
File clerks	273,000	16,000	Printing pressmen	169,000	5,100
Health administrators	184,000	16,000	Radio, TV service technicians	131,000	6,700
Insurance agents, brokers	548,000	27,500	Stationary engineers	179,000	7,400
Lawyers	479,000	23,400	Tool-and-die makers	182,000	9,000
Librarians	187,000	8,000	Truckdrivers	1,923,000	66,400
Musicians, composers	149,000	7,200	Welders, arc cutters	679,000	33,800
Nurses, practical	402,000	53,000	<b>SERVICE OCCUPATIONS</b>		
Nurses, registered	1,112,000	83,000	Barbers	121,000	6,100
Pharmacists	136,000	8,900	Bartenders	262,000	17,800
Physicians, osteopaths	424,000	21,800	Cooks, chefs	1,186,000	79,000
Psychologists	106,000	5,600	Cosmetologists	542,000	30,000
Public-relations workers	131,000	8,300	Dental assistants	130,000	13,500
Salesworkers, retail	2,336,000	155,000	Dishwashers	456,000	22,400
Secretaries, stenographers	3,590,000	295,000	Firefighters	221,000	6,300
Social workers	365,000	25,000	Food-counter workers	463,000	33,000
Surveyors	82,000	3,500	Guards	546,000	63,300
Systems analysts	157,000	7,600	Nurses' aides, orderlies	1,037,000	83,000
Teachers, college	562,000	17,000	Police officers	475,000	32,500
Teachers, elementary and kindergarten	1,600,000	70,000	Private-household workers	1,162,000	53,000
Teachers, secondary	1,154,000	13,000	Waiters	1,363,000	71,000
Teachers' aides	342,000	29,000	<b>FARM OCCUPATIONS</b>	<b>2,798,000</b>	<b>200,000</b>
Telephone operators	311,000	11,600			
Typists	1,044,000	63,000			
X-ray technologists	97,000	6,300			

affected by this emphasis on rights in the job market. Pollster Daniel Yankelovich reports that about three fourths of the nation's work force has been overtaken by "a psychology of entitlement," a feeling that they deserve good jobs, a rising standard of living, plus a satisfying work experience.

The specter of increased job competition already has prompted many young workers to upgrade their credentials. Weber believes this is why enrollment in graduate business schools has increased threefold over the past 12 years. "They're looking for ways to distinguish themselves from the rest of the horde," he says.

Disappointments also are becoming commonplace among these highly competitive workers. A survey published earlier this year by the University of Michigan showed that 60 percent would prefer different jobs.

Unions hope to capitalize on this dissatisfaction. Less than 25 percent of the nation's workers are union members—a record low. But Labor Department figures indicate that union membership is on the rise again. AFL-CIO President George Meany predicted this trend will pick up steam:

"In the '80s, I am confident there will be strong growth of unionism among groups previously considered not interested in union representation." Unions are becoming increasingly popular among civil servants, hospital workers, clerical employees and professionals.

**Unions to shift goals?** Since many union wage scales are indexed to rise in tandem with prices, union leaders are expected to put more emphasis on nonwage issues. Thus, occupational safety and health will be one of the biggest labor issues of the 1980s.

As for employers, increasing numbers are trying out what Weber calls new "work styles" to suit the changing needs of today's work force. Many workers already are setting their own hours. Weber predicts that more emphasis in the future will be placed on reducing the standard work year rather than shortening the workday.

"The fastest-growing phenomenon will continue to be the part-time job," adds Jerome Rosow, president of the Work in America Institute. "It is responsive to the needs of three major special groups: Young people, women and older workers."

Computers, videotape and satellite communications will open the way for employees on the same project to work at different hours and sometimes in different cities. Experts say these innovations will even make it possible for growing numbers to work at home.

# For Americans: The New Tests Ahead

As another decade approaches, leaders in many fields are considering prospects facing this nation and the world. To preview what lies ahead, this magazine interviewed experts in global affairs, the arts, the women's movement and social trends. Their predictions follow.



## Challenge Abroad: "Coping With Changed Military Balance"

Andrew Knight  
Editor,  
The Economist of London

**Q** Mr. Knight, what do you see as the principal challenges facing the United States in the 1980s?

**A** The two principal challenges for the United States, as I see them, are: One, coping with the changed military balance between itself and the other major superpower—notably the strategic-arms balance that is moving in favor of the Soviet Union.

Two, making all countries—superpowers and nonsuperpowers—reckon again that there must be a risk attached to crossing the United States in any way.

There used to be a time when any country that was planning a change of regime or of alliance or of allegiance had to reckon first whether it was a good thing or bad thing to be in the Soviet camp, and, second, what price it might have to pay for annoying the United States.

I think the first factor still exists, but the second—the unpredictable and possibly onerous response of the United States—now exists much less. That's bad.

**Q** In the decade ahead, do you see the U.S. reversing the adverse strategic trend?

**A** Yes. I see a prospect of America reversing that trend. But, however much the United States may decide to change the balance, it will take time to carry through any political decisions that may be taken. Therefore, I see a window of danger from now until the mid to late 1980s.

By that I mean that the strategic balance will enable the Soviet Union to take more risks, either directly or, more likely, through surrogates—such as the Cubans, of course, and the East Germans, as well as local surrogates, like Vietnam.

Given the strategic balance and America's post-Vietnam reluctance to get involved locally, the Soviet Union will be able to do that with impunity.

How long this window of danger lasts will depend only

- Andrew Knight looks at dangers for U.S.
- Beverly Sills on the future of the arts
- Eleanor Smeal forecasts gains for women
- Philip Hauser: America still the "best country"

partly on the speed with which America's MX missile is deployed and other elements [manned bombers and submarine-launched missiles] of the strategic triad are beefed up.

**Q** In that situation, do you expect détente between the U.S. and the Soviet Union to survive through the '80s?

**A** I don't like the word *détente*. I've always thought that it is a sort of neon light over the top of a bordello. It beckons people and reassures them that there's a comfy place inside. That has its effect—particularly on the younger generation that doesn't remember what it's like to be threatened ideologically.

I prefer to talk about *sane management* of the superpower relationship. At the moment, the management of the relationship is relatively sane. The trouble is that all countries become less rational when they're in election campaigns.

The United States is entering a presidential campaign. And there now is a succession question in the Soviet Union for the first time in many years—which is their nearest equivalent of an election period. That could threaten the sane management of the Soviet-American relationship.

**Q** You've expressed doubts about America's ability to influence the behavior of other nations. What about the American commitment to the security of Western Europe? In your view, will that remain reliable through the 1980s?

**A** It depends on the next President. I think that the basic commitment to Western Europe's security is there in the American establishment. But there is a lack of coherence in the leadership at the very top—certainly in our perception.

**Q** Why do you attach so much importance to the character of the President when it comes to the American commitment to Europe?

**A** Because I think the strength of real political leadership is to see only one side of the question on certain issues—to be absolutely firmly on that side of the question. President Carter's particular gift is to see with great fairness many sides of each question. That isn't always a desirable trait in a political leader.

If you were to talk privately to Helmut Schmidt in West Germany, or Giscard d'Estaing in France, or even Margaret Thatcher here in Britain, I think you would get a feeling of uncertainty about Carter's real intentions. You would find admiration for his qualities and his mind, but an unsureness about his spine.

**Q** In view of that uncertainty about American leadership, do you see Western Europe reducing its reliance on the U.S. and moving toward a kind of "Finlandization"—accommodation with the Soviet Union?

**A** I think that danger is usually rather overdone. When one talks in those terms, one usually is thinking of the sort of détente practiced by the Federal Republic of Germany—forgetting that West Germany has a long, vulnerable border with East Germany, which has an awful lot of peo-

ple that speak a common language. There are family ties that cross the border. That makes for constant humanitarian, commercial and other pressures. But we should be chary of being alarmed too much into thinking that West Germany, because it had to cope with this, is going neutralist. It isn't.

**Q** Do you see some form of independent Western European defense organization replacing the present NATO setup?

**A** In the 1990s, maybe. In the 1980s, I see the present pattern continuing, with Europe remaining as dependent on the United States for its security as now. Whether Western Europe moves toward a kind of independent defense system in the 1990s will depend on what shape the United States is in at the end of the 1980s, strategically and in its own skin.

**Q** Looking beyond Europe: How do you see the triangular American-Russian-Chinese relationship developing in the '80s? Do you expect China and Russia to move back into a partnership again?

**A** The Chinese and Russians may at last start managing their very difficult relationship more sanely. But I don't think this would extend to a real rapprochement between them. Their historic interests as huge, continental powers are as much in conflict under Communism as they were when they were both imperial powers. I see no strategic reason why that should change.

**Q** Will the U.S. be able to exploit this triangular relationship more profitably in the future?

**A** I think it's been exploited reasonably well so far as an extra way of keeping Russia off balance. But China, for all its central position historically, is at the moment weak industrially and weak militarily in a strategic sense—though in local conflicts, the Chinese may now become much more important. Given that strategic weakness, the United States can profit only in a limited way from cultivating the Chinese.

**Q** Finally, on the question of energy: Do we face a dangerous scramble for oil ahead—one that could lead to a major war?

**A** There already is a dangerous scramble. The real danger lies in the unpredictable nature of the regimes that control the oil. One would be a very confident man to put 20 years on the existing order of things politically in Saudi Arabia. Also, the Soviet Union and the Eastern bloc for the first time are becoming reliant to a large extent on outside energy.

A foolish Soviet leader would play it short and try to mess around with the West's oil jugular. I hope that a Soviet leader who is playing it long will be so uncertain about his own future sources of energy that he would, by the end of the 1980s, decide to run an effective condominium with the United States in the Persian-Arabian Gulf.



## Look for a "Real Flowering of the Arts In This Country"

**Beverly Sills**  
Director,  
New York City Opera

**Q** Ms. Sills, will financial problems prove a big hurdle for the arts in the 1980s?

**A** A recession will have a serious effect on our box office because people give up luxuries first, and unfortunately the

arts are still considered a luxury. However, I think we won't suffer quite as much as we would have 15 years ago, because we have had a boom in the arts. But we'll have to be very cautious about keeping the price of tickets within the reach of the public, despite spiraling inflation.

There's a terrible need in people's lives now for a little beauty. There's a need to escape dreariness. I was listening to a news broadcast this morning—it was so dreary. During such times, the need for amusement and escape, and to see and hear beautiful things, becomes very strong in all of us.

**Q** Which fields will flourish most in the 1980s?

**A** At the moment, we're going through a ballet mania. Five years ago, it was opera mania. Over the next few years, we'll probably see an explosion of young painters and sculptors because that field has been less explored.

There are also great times ahead for opera. There's a whole new wave of sensational young singers coming up now. If they don't get pushed too fast, in about five years we're going to have a whole new crop of superstars.

**Q** Will the quality of entertainment in the media—TV and movies—improve?

**A** The movies strike me as going downhill. I am at the point where I'm not terribly keen on going to the movies. I went to a film with my husband and my daughter, who is 20, and we were all embarrassed by the action.

It seems to me that if movies are going to come back, they'll have to remember the words *entertainment* and *taste*. I suspect they are going to face declining audiences in the years ahead unless they return to quality productions.

TV also has a long way to go toward making any impact on quality. For the evening hours, I think the commercial networks should get together and agree to give over 2 hours a week or so each to an artistic venture.

In that way, at least once in a while, we would get an opera from one station, a ballet from another and a drama from another in live performances. They could afford to do serious artistic works without total collapse of the television industry.

**Q** Will the comforts of sitting at home watching all the new electronic gadgets keep people away from live performances in the next decade?

**A** No. Nothing beats a live performance. There's nothing as exciting as going to the theater and seeing a play. You don't get that on TV, where everything is on tape. People need to leave their homes, to go out and be with other people. That's part of human nature.

**Q** Are there any signs of new creative giants appearing in the arts—the Beethovens and Shakespeares of the future?

**A** Perhaps, although there are plenty of forces operating against that. There just won't ever be a very large supply of Handels, Verdis and Beethovens.

Economics have forced us to be overly cautious about what we produce in terms of new works, because with the limited amount of subsidization that we get, we can't afford to mount too many new productions. We just can't take as many chances.

But there are a few encouraging signs. I'm chairman of the National Opera Institute, and we have started something called a laboratory workshop where premières of operas can be done under laboratory situations. There, a great many of the kinks can be ironed out through weeks and weeks of rehearsals. I'd like to start one up right here in the New York City Opera. If we had a small theater, I would have it in a minute.

I see something else. A great deal of experimentation and training is being done in some of the better universities. At Indiana University, for instance, they have an opera house that is the match of any opera house in many European cities.

President. But we do have a sense of tuning about when our issues will break the barrier. Women's issues became national issues in the '70s, and it seems clear that in the '80s they're going to become really major issues.



## U.S. "Still Best Country In Which to Live, and It Will Remain So"

Philip M. Hauser  
Professor Emeritus of Urban  
Sociology, University of Chicago

**Q** Professor Hauser, are class and race conflicts going to increase or decrease in America in the 1980s?

**A** One cannot be sure, but there are factors that may make for a considerable increase in frictions and hostility.

For one thing, we are probably now in a recession. As the recession advances, it will be the blacks and Hispanics—last in—who will be first to lose jobs. If they fail to narrow the gap between themselves and the majority of the white population, this would greatly increase the probabilities of friction.

In the longer run, if economic growth in this country drops to zero growth, and even possibly negative growth, we may face a situation in which disadvantaged groups are able to improve themselves only at the expense of decreasing the income level of the more affluent part of the population. What has kept the level of hostility and alienation under control is that a rapidly growing economy has made it possible for disadvantaged groups to continue to improve their lot, even while the gap between them and the more affluent population increases.

**Q** Which groups will make gains in the 1980s?

**A** The most powerful in terms of the political situation and numerical strength. If we get into a no-growth situation, it will be the more affluent whites who will continue to hold on to what they already have. But they may find that they cannot achieve much growth, either. It becomes a problem, then, of maintaining their relative position. By maintaining their relative position, weaker elements in the population cannot get improvement. This would include not only the blacks, Hispanics and other minority groups such as recent immigrants, but also the aged and perhaps the young.

**Q** Why are the young so discontented?

**A** Our postwar-baby cohort, which will be 70-million strong in about 1985, has had up to now a pretty miserable experience with the American system. This is especially true if you contrast its experience with the Depression-born cohort, which was in short supply relative to the demand for its services and opportunities in life.

The postwar-baby-boom cohort is in supply greater than society has been able to absorb. The postwar babies have had inferior schooling and greater competitive stress, not only in the classroom and on the athletic field, but throughout their careers.

Because the postwar co-

hort has had a more difficult time, this is a group that will not only be more receptive to drastic social, economic and political changes, but perhaps insistent upon them.

**Q** Will Americans become more discontented with government and traditional institutions?

**A** Yes, in all probability, for the reasons I've just indicated. In my judgment, 1979-80 may be a point of discontinuity in the American experience, in the same way in which 1929-30 was.

No one can predict with certainty, but it is possible, given the accumulation of unprecedented difficulties that the American population has had over the last decade, that a man on horseback in the coming election can swing the U.S. in a very dramatic way—either to the right or to the left. In my judgment, it will, in all probability, be to the left.

**Q** Will traditional institutions—schools, churches and families—be able to help ease the strains of the 1980s?

**A** To some extent. Of the three, the family, so far, has shown the greatest adaptability. The American family today is not what it was a hundred years ago. There are some that decry this, but I think the strength of the family is that it has adapted to the new 20th-century world we have created.

For one thing, every one of the traditional functions the family performed has either been lost or attenuated. For example, our divorce rate is the highest in the world, and so is our remarriage rate. We continue to describe our marriage form as monogamy, when an accurate description is sequential polygyny and polyandry. The mere fact that we have this tremendous turnover in mates is one reason why the family will persist, even with this changed form.

The church has failed to make the adaptations. Witness the extreme drop-off in religiosity of the American people. I'm talking about not only church attendance but fundamental religiosity and belief in traditional religion. I don't think the church, for the mass population, is going to be alleviating much of the distress out of this stressful situation.

And education? Education is torn asunder within our urban areas around segregation issues, which in the North are far from being resolved. Education has proved incompetent to deal with the new problems of newcomer groups to urban and metropolitan areas—the blacks, the Hispanics. Curricula in education have been modified to some extent, but there is a long way to go.

**Q** Will any traditional values be maintained?

**A** Some basic values will remain—freedom to speak our minds, including dissent with the government, and freedom to lead our own lives, so far as work, education, churchgoing or nonchurchgoing, recreation and so on are concerned.

But I have to qualify this: There never has been a society in which freedom was without its constraints. In our kind of highly interdependent society, there is no such thing as complete freedom to do anything: it's all within constraints. The trick is to impose constraints on behalf of the welfare of the total society without interfering too much with the freedom of individuals.

**Q** In your opinion, will this country still be a good place to live in 10 years?

**A** Despite all its weaknesses, in my judgment this is still the best country in which to live. And short of the completely unpredictable, I believe it will remain so for the next decade and for some indefinite period well into the future.

## Challenges of the '80s

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New Zoning Ceiling  
9/25/80

DWELLING UNIT POTENTIAL ON VACANT LAND  
BY SEWER SERVICE CATEGORY  
(EXISTING ZONING, SEWER CATEGORIES 1-5)  
MONTGOMERY COUNTY

	Category 1-3	Category 4	Category 5	Category 1-5
Western Wedge	400			400
Eastern Wedge	1,000			1,000
Clarksburg			5,300	5,300
Olney	2,000		400	2,400
Cloverly	1,600	700	1,200	3,500
Potomac	3,600			3,600
Rockville	1,700			1,700
Fairland	10,300	700	700	11,700
Germantown W	15,400		500	15,900
Germantown E	4,200			4,200
Gaithersburg	22,200	800		23,000
Kensington	7,800		2,200	10,000
North Bethesda	4,200			4,200
Bethesda	3,200			3,200
Silver Spring	2,200			2,200
Totals	79,800	2,200	10,300	92,300

Preliminary Counts from Computerized Land Data File, 9/22/80.



DWELLING UNIT CAPACITY BY STRUCTURE TYPE FOR POLICY AREAS  
ON VACANT AND REDEVELOPABLE LAND  
(SEWER CATEGORIES 1-5 ONLY, EXISTING ZONING)

Category Zoning Density Range (Units Per Acre)	Large Lot RE-2/ RE-1 .5-1.0	Medium Lot R-200/ R-150 2.0-2.5	Small Lot R-90/ R-60/R-T 5-12	Garden R-30/R-60 14.5-12.0	High Rise RH/R-10 43.5	Redevelop- ment CBD + Transit Areas 43.5-100	Totals	% of Total Vacant in Planned Community Zones
Wedge Areas	100	900	400				1,400	0.0
Western Wedge		400					400	0.0
Eastern Wedge	100	500	400				1,000	0.0
Suburban Fringe	2,200	9,400	2,800	4,200	2,600		21,200	0.0
Olney	400	1,900	100				2,400	0.0
Cloverly	100	3,400					3,500	0.0
Potomac	1,400	1,000	1,200				3,600	0.0
Fairland	300	3,100	1,500	4,200	2,600		11,700	0.0
I-270 Corridor		11,500	19,400	14,300	4,900	3,00	53,100	29.5
Clarksburg		4,000	900	400			5,300	25.7
Germantown W		900	6,500	6,600	1,900		15,900	52.4
Germantown E		200	2,800	700	500		4,200	0.0
Gaithersburg		5,200	8,700	6,600	2,500		23,000	28.0
Rockville		1,200	500			3,000	4,700	0.0
Suburban Corridor		1,500	6,500	4,400	7,200	15,600	35,200	76.6
Kensington		1,200	3,400	3,900	1,500	2,300	12,300	29.0
Silver Spring			700	100	1,400	6,300	8,500	0.0
North Bethesda		100	600	400	3,100	4,900	9,100	0.0
Bethesda		200	1,800		1,200	2,100	5,300	0.0
Totals	2,300	23,300	29,100	22,900	14,700	18,600	110,900	20.5

Categories based upon Development Plans.

Note: For Planned Community Zones (TS, PD, PN, PRC), developers were interviewed and plans were reviewed for expected unit type mix. The 18,300 dwelling unit capacity within these zones was divided between small lot (10,600 units) and garden (7,700 units).

Preliminary Counts from Computerized Land Data File, 9/24/80

DD:ms



COMPARISON OF PROJECTED DEMAND FOR SEWERED RESIDENTIAL LAND  
TO AVAILABLE CAPACITY IN SEWER PLAN CATEGORIES 1-5  
(EXISTING ZONING)  
MONTGOMERY COUNTY

Land Use	1980	1990		2000	
	Capacity	Demand <sup>1</sup>	% Capacity <sup>2</sup>	Demand <sup>1</sup>	% Capacity <sup>2</sup>
Single-family	54,700	22,500	41.1	42,000	76.8
Large & Medium Lot <sup>3</sup>	25,600	12,500	48.8	22,000	85.9
Small Lot <sup>4</sup>	29,100	10,000	34.4	18,000	61.9
Apartment	56,200	17,500	31.2	35,000	62.3
Garden	22,900	12,500	54.6	23,500	102.6
High-rise	14,700	3,000	20.4	6,500	44.2
Redevelopment	18,600	2,000	10.7	5,000	26.7
Total	110,900	40,000	36.1	77,000	69.4

<sup>1</sup> Intermediate Forecast: excludes demand in Sewer Category 6 (6,000 units are forecast for development on septic systems from 1980 to 2000).

<sup>2</sup> Demand divided by capacity.

<sup>3</sup> All zones requiring 1/2 acre or more per unit.

<sup>4</sup> All zones requiring less than 1/2 acre per dwelling unit (includes townhouses).

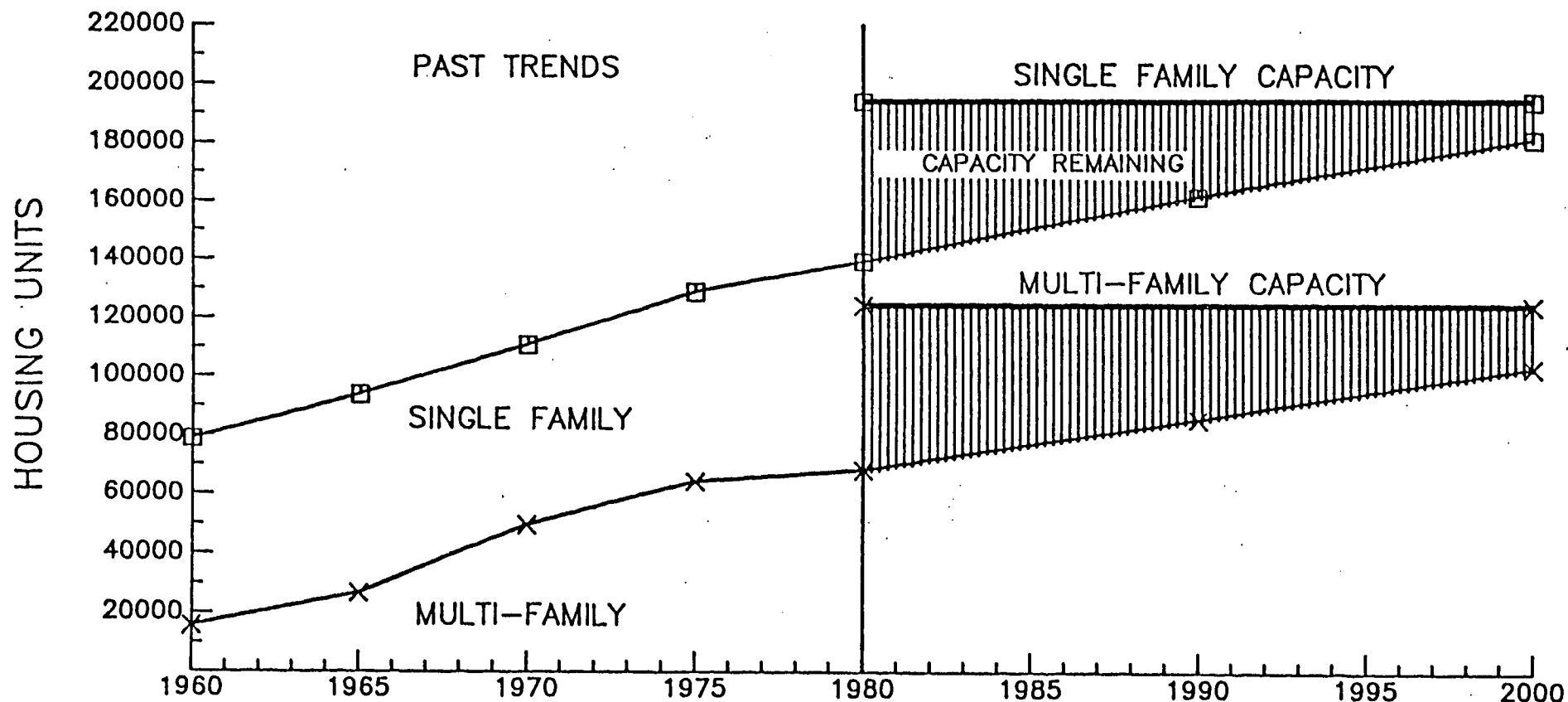
Note: For Planned Community Zones (TS, PD, PN, PRC), developers were interviewed and plans were reviewed for expected unit type mix. The 18,300 dwelling unit capacity within these zones was divided between small lot (10,600 units) and garden (7,700 units).

Preliminary Counts from Computerized Land Data File, 9/24/80.

DD:ms

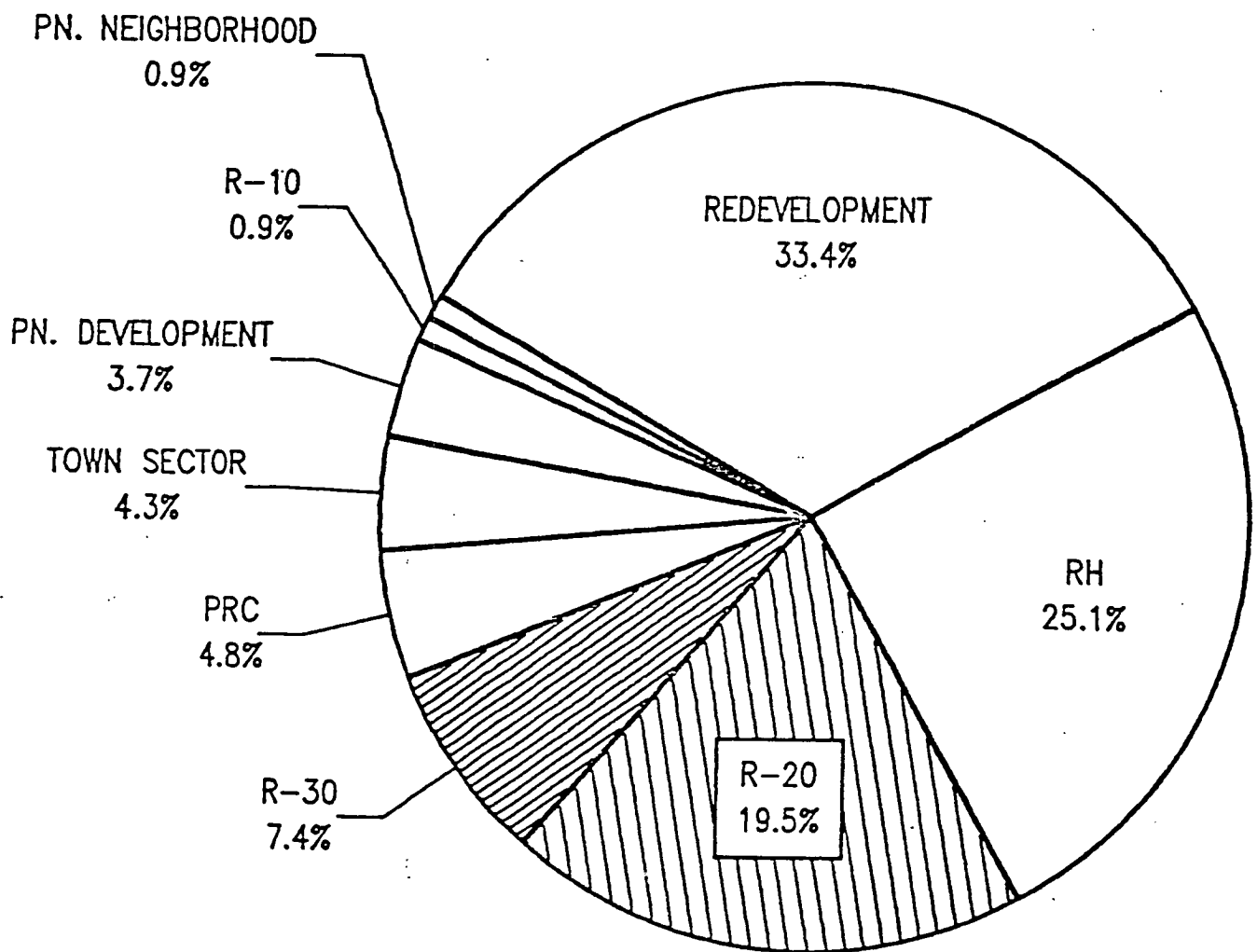
# PAST TRENDS IN HOUSING GROWTH BY STRUCTURE TYPE&FORECAST TO YEAR 2000

(FORECAST IS FOR SEWER CATEGORIES 1-5)  
MONTGOMERY COUNTY MARYLAND



SOURCE: MCPB, SPECIAL PROJECTS DIVISION

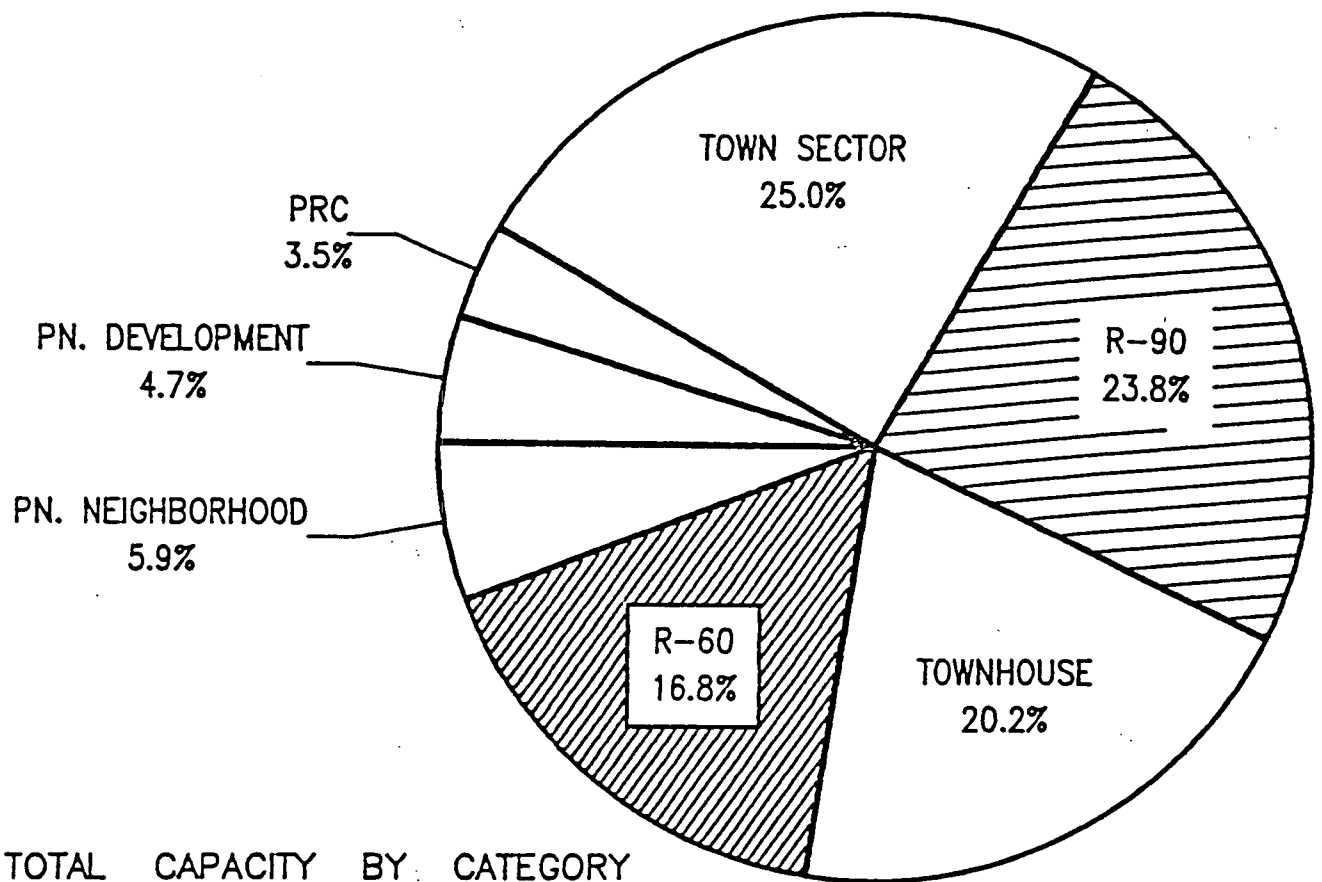
PROPORTIONAL DISTRIBUTION OF MULTI-FAMILY ZONING CAPACITY  
MONTGOMERY COUNTY  
(SEWER CATEGORIES 1-5)



TOTAL CAPACITY BY CATEGORY

REDEVELOPMENT	18900
RH	14200
R20	11000
R30	4200
PRC	2700
TOWN SECTOR	2400
PN. DEVELOPMENT	2100
R10	500
PN. NEIGHBORHOOD	500

PROPORTIONAL DISTRIBUTION OF SMALL LOT ZONING CAPACITY  
MONTGOMERY COUNTY  
(SEWER CATEGORIES 1-5)

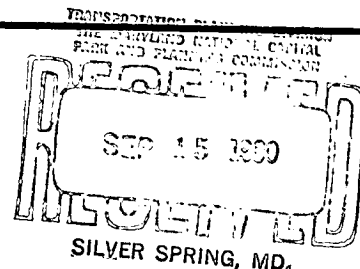


TOTAL CAPACITY BY CATEGORY

TOWN SECTOR	7300
R90	6900
TOWNHOUSE	5900
R60	4900
PN. NEIGHBORHOOD	1700
N. DEVELOPMENT	1400
PRC	1000

1

# MEMO



September 12, 1980

TO: Richard Tustian, Director of Planning  
FROM: Dale Price, Chief of Research Division  
SUBJ: Recommendations of Montgomery County Housing Policy

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The attachment includes a list of specific issues and actions as included in the Executives Recommended Housing Policy Statement which was released in June. The County Council will be holding a number of worksessions on these recommendations and other housing issues starting on September 29th., with a deadline for adopting a housing policy statement by January 1, 1981.

Other issues were introduced by public testimony received at two public forums on housing policy during the summer. A summary of this testimony is also attached.

DP:smb  
Attachments

CC: John Conway  
Drew Dedrick  
Jorge Valladares  
Bob Winick  
Don Spivack  
John Matthews  
Perry Berman  
John Westbrook  
Phil Perrine

SPECIFIC REFERENCES IN THE HOUSING POLICY TO ACTIONS THE  
COUNTY GOVERNMENT WILL TAKE

<u>Page Reference</u>	<u>Task</u>	<u>Agency</u>	<u>Time</u>
2	Adopt a set of principles for the 1980's	Council & Executive	January 1981
2	Adopt allocation priorities for the expenditure of local tax resources	Council & Executive	January 1981
2	Apply these priorities to budget decisions		FY 1982
2	Request an annual report from the Technical Advisory Committee (TAC)		February 1981
2	Modify TAC's mandate if needed		Spring 1981
3	Legislative proposal to transfer selected technical provisions of the road code from the County code to Executive Regulations		Spring 1981
3	Analyze changes & fees associated with development authorization	OMB	1981
3	Executive proposal assessing the feasibility of coordinating & consolidating bonding requirements associated with construction	Executive	January 1981
3	Recommendations on how to reduce the time required to secure approvals for development	DOT, DEP, DHCD, SCS, M-NCPPC, WSSC	July 1981 improvements by end of 1982
3	Executive sponsored legislative proposals on modernizing the Housing Code	Executive	Available for Council by Spring 1981
4	Approve the New Horizons Fair Housing Strategy	Council	August 1980
4	Appoint second New Horizons Task Force to monitor implementation of Fair Housing strategy.	Council	Summer 1980
5	Define assisted housing	Council & Executive	January 1981
5	Develop & place into Executive regulations evaluation criteria for assisted developments	Council	November 1980

<u>Page Reference</u>	<u>Task</u>	<u>Agency</u>	<u>Time</u>
5	Implement a system to guide prospective sponsors of assisted family housing	Council & Executive	January 1981 <sup>9</sup>
6	Develop & adopt standards for occupancy, construction, maintenance of assisted housing	Council & Executive	January 1981
6	→ Complete vacant land inventory	M-NCPPC	September 1980
7	→ Develop strategy to assure sufficient housing development in transit impact areas	DHCD, Metro, M-NCPPC	March 1981
7	Develop local insuring capability to back HOC financing		Summer 1980
9	→ Identify public facilities crucial to assuring that high priority developments can proceed, & assign these a proper importance prior to FY 82 CIP	OMB, M-NCPPC, Homebuilders	Fall 1980
10	Revise MPDU law	Council	September 1980
10	Promote the use of government-sponsored tax exempt revenue bonds	HOC	1982
11	Conduct a design competition; purchase innovative designs & have them approved by DEP	DHCD	Spring 1981
40	Completion of Development Manual		Summer 1980
42	All codes which affect construction will be reviewed		1981
51	An evaluation of all real estate sales	CHRB, EHOC, MCBR	Semi-annually
51	Annual report of all marketplace fair housing activities	New Horizons Task Force	annually
51	Conduct a continuing education seminar in EHO	MCBR/EHOC	Begin 1980 Ongoing
54	Conduct ongoing tests for real estate & rental broker practices	HRC/Co. Exec. Council	FY 1981 ongoing
54	Identify critical areas of investment by census tract & collect & review mortgage lending data & the Community Reinvestment Act	DHCD	Summer 1980 ongoing



<u>Page Reference</u>	<u>Task</u>	<u>Agency</u>	<u>Time</u>
54	HIC devise apartment seekers feedback system to be coordinated with HRC Real Estate Reporting Requirements (RERR)	HOC/HIC/HRC	Summer 1980 ongoing
66	Develop an Executive Regulation which: (1) defines the participants in the evaluation of assisted housing proposals, (2) defines the evaluation criteria & their relative importance, (3) defines the process for reviewing an evaluation and (4) defines the rankings and their significance	DHCD	September 1980
78	Publish guidelines for occupancy, maintenance, and production of assisted housing		March 1981
79	Develop a model for grievance procedures for people complaining about tenants of assisted housing. Review with private sponsors & adopt them formally	HOC	January 1981
88	Consider methods for adding flexibility to the PD zone & report to Council	Planning Board	January 1981
89	Explore the feasibility of expanding the use of piggybacks & forward recommendation to Council	Planning Board	January 1981

HOUSING FORUM  
June 18, 1980

Speaker

Dr. Morton Schussheim

Organization

Sr. Housing Specialist  
Library of Congress

Comments

Comes as an individual, representing himself.

Issues

1. Renters are increasingly becoming "have nots" and do not have a wide range of housing options available to them.
  2. Most new construction now taking place is with tax relief to help developers meet costs, operating expenses and high land values.
  3. New construction of rental units in the area is dropping (15,000 a year in the early 1970's to less than 5,000 now).
  4. Conversion of rental units now very prevalent in D.C. and Montgomery County (36,000 units in the past 10 years).
  5. Maintenance of buildings being cut back.
  6. Many families are now paying more than 35% of their income for housing, 2/3 of these families live in suburban communities.
  7. More and more families are facing displacement from conversions
- RECOMMENDS:
1. Partial tax exemption for improvements to buildings.
  2. Housing allowances to tenants-the County should come up with additional funds to supplement Section 8 payments.
  3. Phase out rent control. It is only effective as a short term device.

<u>Speaker</u>	<u>Organization</u>	<u>Comments</u>	<u>Issues</u>
Dr. Morton Schussheim (Cont'd)			4. Increase rental housing construction.
Dr. Alfred Muller	Individual	3 ways to persuade developers to build: 1) leverage funds from County sources; 2) selective removal of taxes and regulations; 3) explore cost - Sharing arrangements with other jurisdictions.	1. There is a lack of affordable housing in the County. 2. Need for residential complexes near transit stations c. Special needs of elderly should be emphasized in metropolitan areas--near transit stations.
Dr. Stanley Miller	Dept of Interior	Supports County's efforts to create a housing policy. Document was poorly put together with respect to: 1) Maps - illegible. 2) Ambiguities in the language. 3) No discussion of the impact of assisted housing on the environmental quality. 4) Definition of subsidized housing should be expanded to include military housing. 5) No data on labor force dynamics- what kinds of jobs are expected to open up the 80's. (Need employment data by type of industry, where located, people to fill them). 6) A subsidized housing project's effect on a neighborhood is left to HOC's determination and not statistical analysis. 7) The profiles of assisted housing projects used as typical examples are not necessarily typical. 8) Criteria for assisted housing do not measure: crime, delinquency, vandalism, etc., which are better indicators of neighborhood suitability-	1. Draft is a starting point, and need to continue the process. 2. Priority ratings are not much different from each other. The County will still be permitted to do anything they want in any C.T. with Council & Executive approval

<u>Speaker</u>	<u>Organization</u>	<u>Comments</u>	<u>Issues</u>
Dr. Stanley Miller (Cont'd)	Dept. of Interior	9) Not an adequate allowance for density of population as a criteria to measure concentra- tion 10) Interest rate projection is wrong- Chase Econometrics pro- jects 10.9% for the 80's?	
Robin Ficker	Delegate	1) Potomac should remain a "green wedge" and not consid- ered part of the "developing fringe." 2) What is the schedule for Master Plan updates for the upper County areas?	1) Cannot have assisted housing and group homes in all residential areas of the County (as stated on p. 65 of the Housing Policy docu- ment) if most areas are zoned for large lots. 2) must take into account the existing zoning of highest priority census tracts. We cannot afford to build low/moderate income housin in large lot areas.
Lon Dring	Concerned Citizens for Affordable Housing	1) Commends the staff on a job well done 2) Need a clear role for citizen groups in the policy report.	1) Existing Master Plans and land availability will make recommenda- tions in report null and void.
Charles Potter (speaking for Raymond Loo)	Allied Civic Group	1) Main housing crisis is based on a deficiency in rental housing-County should redirect its focus to encouraging private builders to build more rental housing. 2) Endorses the emphasis on rehab of existing rental housing. 3) Opposes the relaxation of zoning laws. 4) Applauds a fair share dis- tribution policy for the County-Council should endorse it.	1) use tax relief and other measures to stimulate more new construction 2) citizens should have more input into the use of vacant land in their neighborhoods. 3) HOC should not be independent of the County - no accountability to the public.

<u>Speaker</u>	<u>Organization</u>	<u>Comments</u>	<u>Issues</u>
Steve Eckert	Suburban Md. Homd Builders	1) Is most supportive of guiding principal #13 2) Housing Needs Analysis section of the report should become goals to which policies are redirected. 3) Home builders will form a Task Force to develop proposals and recommendations for Council consideration before September.	1) Need for Executive and Council cooperation with home builders - where does the provision of housing rate among the government's priorities? 2) Multifamily housing needs are the most critical 3) Need properly zoned land and the elimination of rent control
Barilyn Fiety	Individual	1) Must have enforceable action plan along with policy recommendations 2) Supports a rational plan for distribution of assisted housing	1) Relaxation of zoning is unacceptable 2) Put amenities in areas of greatest concentration of assisted housing
M. Riley (speaking for Rev. James MacDonell)	Robert Pierre Johnson Housing Development Corporation	1) Add another guiding principal: Besides government and the private sector, recognize non-profit organizations as major contributors to providing low and moderate cost housing.	
Mansfield Kaseman	Individual	1) Wants incentives for churches to develop housing on their own properties.	
William Jones	Chairman, Housing Policy Implementation Committee	1) Wants more action and decision in facing up to these issues. This policy has been in process for a long time. 2) So little impact from last effort 3) No quick fix solutions	

<u>Speaker</u>	<u>Organization</u>	<u>Comments</u>	<u>Issues</u>
Jean Kosow	Interbranch Council of the American Association of University Women	1) Supports policy 2) give incentives to builders who want to provide low and moderate cost housing	
Yale Wiesberg	Montgomery County Civic Federation	1) Housing Policy may be used to erode Master Plan recommendations 2) Why were they not included in the development of the draft policy 3) Need better definitions on how much assisted housing is planned, for who, and where 4) The document will raise serious questions on land use policies.	1) Document does not note the decline projected for interest rates 2) County should work for FHA approval on moderately priced developments 3) Transit Impact Areas should include residential 4) Include civic activists on HOC's Board of Commissioners 5) Change MPDU law to provide windfall profit tax 6) 4% transfer tax on condominium sales may be too low for higher prices units 7) consider the shared-equity concept.
Arlene Simons	Community Housing Resources Board (CHRB)	1) The distribution policy and current Master Plans conflict 2) Provide for citizen input at the time parcels are being considered for development	1) Can the rating system provide housing choice and enough assisted units at the same time? 2) Pockets of poverty defined in the Community Renewal Report should have been resurveyed and included in the Housing Policy
Mabel Renke (speaking for Cheryl Morrow)	Women's Political Caucus	1) Be sensitive to barriers against women in the area of equal housing opportunity	

<u>Speaker</u>	<u>Organization</u>	<u>Comments</u>	<u>Issues</u>
Henry Altenberg	Woodside Forest & Garden Civic Association	1) Supports document 2) people should not profit from assisted housing 3) use a distribution policy based on square miles, not census tracts.	
Walter Petzold	Individual	1) Infusion of more low interest rate mortgage money is needed 2) Assisted housing units that are centrally located make the most sense	
Milton Lipnick	Individual		1) Rent increases are not related to profits 2) Bar graph on CPI, rents and sales has no relevance
Dorothy Kaplowitz	Individual	1) Government control in producing 70,000 new units over the next 10 years should not be permitted - this is not democracy  2) Objects to HOC's pre- notification system for low interest mortgage loans. This destroys the concept of fair and equal housing opportunities- sees it as "secret maneuvers" on the part of HOC	

SpeakerOrganizationsCommentsIssues

John Brandenburg

Individual

- 1) Endorses housing policy
- 2) Supports racial and economic integration in all neighborhoods
- 3) Believes in freedom of choice as a housing policy
- 4) Supports public/private cooperation in providing housing

- 1) Plan does not address the issues of assisting people in remaining in their neighborhoods after being displaced by condo conversion.
- 2) Housing site selection should be delegated to County Executive
- 3) Public program and resources should be directed to the neediest first
- 4) Distribution plan should establish short-term goals and create limits in each census tract for assisted housing.

Reeve Ervine

Arcola-University Civic Association

- 1) Endorses Dr. Muller's criticisms of the draft including:
  - a. the use of a bar graph comparing CPI, sales and rents instead of presenting actual figures over period of time
  - b. presenting only 3 sample projects when information on all housing projects should have been presented in Appendix IV
  - c. The horrific use of the priority rankings
  - d. The need for better definition
- 2) Methodology on distribution of assisted housing does not take into account military housing as being assisted housing.
- 3) Provide all data used in formulating the housing policy instead of just staff analysis and conclusions.

- 1) Allowing Council to have final approval on what housing will go where is a serious loophole in the policy
- 2) If anything can be done with Council approval what protection do the citizens have when an assisted project is proposed for a low priority area.



<u>Speaker</u>	<u>Organization</u>	<u>Comments</u>	<u>Issues</u>
Reeve Ervine (Cont'd)		4) Believes indicators like low minority school enrollment were too subjective.	
Barbara Heyman	League of Women Voters	1) Commends staff for document 2) Supports low/moderate income housing provisions including an increase in rental housing units 3) Supports changes in zoning ordinance to permit more development 4) Supports conversion of single-family homes to multi-family. 5) Supports code enforcement 6) Supports group homes	1) Calls for the elimination of fragmentation between various housing agencies.
Rita Morgan	Suburban Maryland Fair Housing	1) Commends staff for preparing a policy that is inclusionary rather than exclusionary 2) Supports goal of an open and integrated County 3) Supports elderly housing as a neighborhood asset 4) Suggests that term "concentration of racial minorities" be changed to simply minority population on page 69 5) Supports technique of using census tracts for distributing assisted housing.	

<u>Speaker</u>	<u>Organization</u>	<u>Comments</u>	<u>Issues</u>
Malcolm Rivkin	Individual	1) Endorses distribution policy 2) Mobilize surplus County land in highest priority areas 3) Attempts should be made to pair young families with children to the large older homes in the down-County areas. This will help to solve the problem of underutilized schools.	1) Sees difficulties of providing assisted housing when policy states that "assisted housing will be developed at densities which conform to or are lower than those permitted by master plans" p. 78
Mr. & Mrs. Horace Harding	Individuals	1) Code enforcement is not really being pursued in down-County area 2) More amenities and parks for urbanized areas 3) Call for stronger citizen participation in housing policy and implementation 4) County must put a limit on the size of 100% assisted housing developments 5) Use incentives to get landlords in the highest areas to provide assisted housing	1) Declare moratorium on further development of assisted housing in concentrated census tracts 2) Establish an outside review group to monitor activities of DHCD and HOC
Kelley Pelz	Women's Suburban Democratic Club	1) Supports providing more housing to meet low/moderate income needs	
Rose Kramer	Individual	1) Supports a fair share distribution policy 2) Land costs are a significant factor in determining where housing will be located	

HOUSING FORUM  
July 10, 1980

(Revised Speaker Summary)

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Harold Kramer	HOC	<p>1) Concerned about the way in which the Housing Policy will be implemented. Those concerns are:</p> <p>a) The change in evaluation procedures of assisted housing projects. Fixed scale ratings are only practical when evaluating competitive bid proposals for subsidy funds.</p> <p>b) How assisted housing can be accomplished with high land costs in the highest priority areas.</p> <p>c) More MPDU's could be sold to HOC in high priority areas where land costs prevent government from building.</p> <p>d) the preservation of existing multi-family rental housing through low-interest loans, tax deferrals and other incentives.</p> <p>✓ e) The adjustment of set-back requirements in R-30 zones.</p>	<p>1) Community awareness is needed of housing programs. However, he believes the citizen participation provision of the CDBG program adequately serves this purpose.</p>
Paul Rankin	Commission on Aging	<p>1) A mechanism should be established which would review <u>architectural plans of buildings developed or converted for the elderly</u>. Plans should be checked for the proximity of transportation, shopping, medical services, etc.</p>	<p>1) The programs outlined in the Housing Policy are not adequate to meet the needs of the elderly.</p>

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Paul Rankin (Cont'd)	Commission on Aging	<p>2) The County should establish a place for an additional counselor in HOC that would assist elderly displacees find alternative housing.</p> <p>3) The County should develop a long-range plan which would maintain a list of elderly that qualify for housing assistance, would establish an emergency response plan to find temporary shelter for elderly from displacement, and that would provide for a standardized system established to seek out housing that is appropriate for the elderly.</p>	
Jim Mihalik	Human Relations Commission	<p>1) Council should not allow master plans to be used as an excuse for why this policy might not be implemented.</p> <p>2) Assisted housing should be close to transportation.</p>	<p>1) Agrees with the draft policy's prioritization of census tracts.</p> <p>2) Increasing the supply of available, affordable housing is essential to meeting fair housing standards.</p>
Frank Blunda	Montgomery County Civic Federation	1) Proper role for government is to regulate the housing industry, not to subsidize moderately priced housing.	1) Does not believe that government should assure young families an affordable home prior to their finding employment in the County.
Joan Hatfield	Board of Realtors	<p>1) The increase in the cost of land and housing is directly caused by restrictive zoning practices.</p> <p>2) Zoning changes must be used to increase the amount of R-60, R-90 land and RT land.</p>	1) Would like Council to be aware of the inconsistency between the Housing Policy's recommendations for placement of assisted housing and the Agricultural Preservation Plan.

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Joan Hatfield (Cont'd)	Board of Realtors	3) Cost of housing can be further reduced by decreasing property taxes, eliminating the transfer taxes and setting a moratorium on the creation of new taxes.  3) Recommends that the Council adopt the 13 guiding principals.	
Joan Ennis	Silver Spring Citizens Advisory Board	1) Special bonding is needed to increase rental housing stock. TDR is inflationary.  2) Suggests a moratorium on assisted housing in census tracts rated 9 or above.  3) The average price of housing in a census tract should be included in the evaluation criteria.  4) A survey of deteriorated structures is an important information resource, as is the vacant land inventory.  5) Persons occupying large homes should be permitted to convert these structures in part to rental units when their children leave home.	1) In favor of assisted housing. Advocates performance standards in construction and design rather than material specifications.  2) Weakest part of the draft report is the estimate of demand (too high).  3) Hopes to see a positive program to finance rental units by special bonding assistance.
Thomas J. Schwab	Individual	1) Should investigate ways in which investors can acquire homes and rent them to HOC or low income persons. This way, the government will help families purchase homes with a tax break and help those who need inexpensive rental housing. Council should consider some form of local tax incentive for such an investment.	1) MPDU law could use updating and improvement.

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Thomas J. Schwab (Cont'd)	Individual	2) Should create modest increases in density provisions.	
Carol Rende	Metropolitan Washington Planning and Housing Assn.	1) MPDU program should be strengthened and expanded. 2) Selection of sites for assisted housing is better performed through existing laws. 3) Scatterization cannot take place until existing zoning laws are changed. 4) Residents should not have a veto over assisted housing.	1) Rent control is a perfectly acceptable and fair way to keep housing prices down. 2) Ill-founded environmental arguments should not deter Council from approving Housing Policy. 3) Council should amend its human relations law to prohibit discrimination against families with children.
Eileen Cotter	Sligo-Branview Civic Assn.	1) Opposes creative planning tools which are means to circumvent the planning process. 2) Reducing cluster acreage to 5 acres only means rezoning without proper zoning procedures. 3) TDR's without specified receiving zones means changing the density of down-County land with no benefit to the residents.	1) Applauds the County's efforts in rehab and code enforcement. 2) Her community would be glad to accept additional subsidized housing. 3) Endorses better use of vacant land, maintenance of quality of existing neighborhoods, the need for amenities as well as housing.
Norman Seay	NAACP	1) Definition of affordable housing needs to be clarified. 2) Affordable housing should have access to transportation, stores, etc.	1) Subtle racism in the form of redlining still exists in the County. 2) Salutes the Council and the staff for their efforts. 3) Supports a fair and reasonable profit for home-builders.

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Norman Seay (Cont'd)	NAACP		<p>4) New affordable housing units not to exceed 50 to 100 units.</p> <p>5) Supports scattered placement of affordable housing units.</p>
Don Schmadel	Kensington View Citizens Assn.	<p>1) Rating for single-family rental and percent of subsidized housing for his census tract (36.01) are wrong. Asks that Kensington View community be considered separately with regard to housing matters.</p> <p>2) Housing programs, particularly in his neighborhood, should be geared towards promoting homeownership for low/moderate income families by:</p> <p>a) Raising property taxes to investors and use the additional funds to help the tenant purchase.</p> <p>b) Increasing tax-free bond issues.</p> <p>c) Establishing escrow account from which homeowners can draw funds as needed to make repairs.</p>	<p>1) Homeownership guarantees a more stable population, one that is concerned with the maintenance of their properties.</p>
William Granger (speaking for Don Jefferson) & Vice Pres. of SMFH	Individual	<p>1) Transportation services have been omitted as a criteria for placement of assisted housing.</p> <p>2) Do not lose sight of fair housing principles in trying to accomplish assisted housing goals.</p>	
Ellen Libby	Mental Health Advisory Committee	<p>1) P. 55 of Housing Policy should address mentally and emotionally handicapped who also need alternative housing resources.</p>	<p>1) Supports the premise that people who grow up in the County or who grow old in the County should be able to remain.</p> <p>2) Supports the premise that a wide range of housing choices need to be provided.</p>

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Rev. Frank Poole	Individual	1) Suggests a fund from condo conversion transfer taxes and other sources as a means to promote a wide range of housing options.	
Dr. Joel Schor	Kemp Mill Civic Association	1) Requests civic association input regarding use of County land. 2) Environmental impact factors and housing for the elderly and handicapped are not given proper treatment in the selection of sites. 3) The alliance of political party leaders is suspect towards assisted housing proposals. 4) Request HOC make public their data on the sales of MPDU's. 5) HOC promotes favoritism to special groups.	1) What is to prevent high density development on even County road? 2) Placement of assisted housing in Sligo was ill advised.
Nancy Stark	Commission on Handicapped Individuals	1) Urge that the Sec. 8 limit for handicapped displacees of condos be altered. They are too restrictive under the Emergency Condo Aid Fund. 2) County should encourage builders to build more barrier-free housing. 3) County Executive and the Director of DHCD should include the commission on the New Horizons Task Force Implementation Committee.	1) Handicapped, along with low/moderate income persons and the elderly, are particularly dependent on rental housing. Their importance should be stressed in the policy.



<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Maria Magee	Landlord Tenants Plus	<p>1) There are 1200 rental apartments in converted single-family homes in the TAKoma Park area that exist without the aid of the County.</p> <p>2) Reverse Text Amendment 77003- don't continue to discourage the promotion of this important reserve of moderately priced housing..</p>	
Adrienne Carr	Community Ministry of Montgomery County	1) Assisted housing will bring needed social and cultural diversity to many areas of the County..	
Jack Nehemias (Coments are Robert Simpson's)	Individual	<p>1) Important that the County not undercut master plans.</p> <p>2) County should pursue its share of Federal housing programs, minimizing obstacles to housing production, encourage private sector response.</p> <p>3) Development of surplus County land should coincide with surrounding areas and Council should reunite the criteria on location. Choice should be among and between locations..</p>	1) Urges the Council to make firm commitment to increase the supply of affordable housing in the County.
William P. Roberts & Karl Schlotterbeck	Montgomery County Taxpayers League	<p>1) The writing is very poor in the report.</p> <p>2) The given criteria are irrelevant to most homeowners. Rather, property values, maintenance, alcoholism, crime, delinquency and vandalism are more pertinent indicators.</p>	<p>1) Recommends the implementation of the Housing Policy limited to County residents</p> <p>2) Wants Council to maintain authority over all decision concerning the placement of assisted housing.</p>

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Randy Keesler	Inter-Faith Conference	<p>1) Provide for those who are already residents in the County, of these, provide for those most in need of support.</p> <p>2) The Regional Mobility Program aids private sector displacement.</p> <p>3) Recommends that County enact a law which requires a developer to obtain the consent of 51% of the tenants of a building before converting.</p>	1) Supports efforts to let people remain in their neighborhoods.
C.E. Sites	Individual	<p>1) Need more data on past performance in housing programs in the Housing Policy.</p> <p>2) Focus resources on the neediest.</p>	
Carlos Anzotegua (for Perche Rivas)	Silver Spring Center Advisory Board	1) Cuban refugee influx is not as bad as some predict. These people will become productive citizens.	
Jim Deligianis	Montgomery Co. Education Association	<p>1) MCEA has provided a housing bureau for its members over the past 10 years.</p> <p>2) School enrollment is declining because young families move elsewhere due to high housing costs.</p>	
Connie Gordon	Individual	<p>1) Conflicting policies within the draft: which places housing in areas having public facilities in place vs. urban growth which encourages new housing in areas where services are not yet in place. If you encourage an urban growth policy, you will also encourage people to move thereby providing for more school closings down-County. Minimize neighborhood</p>	<p>1) Approves of the Housing Policy.</p> <p>2) Seventy-five (75) units too large a development 1) need to be sensitive to the needs of receiving communities.</p> <p>3) County could encourage upper income housing in highly impacted areas</p>

<u>Speaker</u>	<u>Organization</u>	<u>Issues</u>	<u>Comments</u>
Connie Gordon (Cont'd)	Individual	impacts vs. recommending large projects (75 units).	
George Benns	Individual	1) Property taxes for under-developed land must be increased in accordance with appreciation of its value. Most government tax revenues come from single-family homeowners which is an unfair burden.	
Gwendolyn Edsall	Ashton-Sandy Spring Civic Association	<p>1) Crisis in housing is due to a lack of rental housing.</p> <p>2) Must encourage the private sector to supply needed housing and rehab work--government should not be in competition with the private sector.</p> <p>3) Remove excessive governmental regulation of the housing industry to encourage building by private sector of low cost homes.</p> <p>4) Encourage scatterization.</p> <p>5) Eliminate NSA urban renewal concept in the County.</p> <p>6) Seats on the Planning Board should be allocated on a geographical basis.</p>	<p>1) Make HOC accountable. County Executive should have veto power over HOC actions. HOC actions should also be reversible by public petition</p>
Keith Bonn	Individual	<p>1) Pages 39, 40 of report do not include a timetable for curing problems.</p> <p>2) Page 67--add employment opportunities and proximity to transportation as additional criteria.</p> <p>3) Establish more incentives to builders to build low cost housing.</p> <p>4) More low cost government backed loans.</p> <p>5) Agrees with provision for awarding innovative architectural plans.</p>	

SpeakerOrganizationIssuesComments

Milton Lipnik

Colesville Towers  
Tenants Association  
and Gray Panthers

- 1) Avoid condo conversions by amending existing laws - protect more thoroughly moderate income people who can't afford to buy.
- 2) Remove vacancy decontrol-- causes rent increases.
- 3) In the long term, use tax exempt bonds to provide housing.
- 4) Reinstate guidelines of periodic increases in rent using the Department of Commerce Index instead of an arbitrary 12%.

1) Housing Policy did not adequately emphasize the importance of rental housing

Lorita Fisher

Individual

1) Supports government assistance, tax benefits, zoning changes to make affordable housing possible.

Robert Simpson

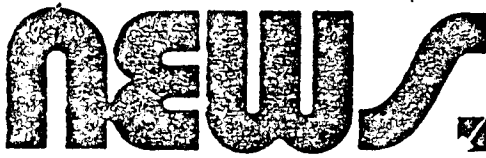
Western Montgomery  
Citizens  
Association

- 1) Role of the County should be to pursue their share of Federal housing monies and encourage the private sector to respond.
- 2) Do not undercut previous Master Plans.
- 3) Highest priority areas are least suited to high density development.
- 4) Zoning conflicts with plans-- clear these ambiguities up.

Norman Christeller

Individual

1) Draft housing Policy is an excellent statement of problems and a good set of policies.



MONTGOMERY COUNTY PLANNING BOARD  
8787 Georgia Avenue  
Silver Spring, Maryland 20907

John R. Hoover  
Community Relations Manager  
565-7401 (office)  
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January 16, 1981

FOR IMMEDIATE RELEASE

SIXTH ANNUAL GROWTH POLICY REPORT - LAND SUPPLY AND DEMAND

The Montgomery County Planning Board has recently released the sixth in its series of Growth Policy Reports which are intended to focus on the evolving growth process in the County. The most recent report "Land Supply and Demand" is in two parts. Land Supply provides a window to view the residential land available for development; Demand presents estimates of population growth under alternative scenarios of economic conditions that may prevail over the next fifteen years.

In order to guide and coordinate the many ongoing growth management activities in the County, information on residential land availability and land absorption is presented. Although land use recommendations are not made, the findings in the Land Supply Report is expected to be of interest to public and private decision makers as well as to groups concerned with land usage. Among the findings in the Land Supply Report are:

. The total dwelling unit potential of vacant and redevelopable residential land, based largely upon existing zoning, is 174,000. The number of dwelling units in the County today numbers 276,100.

. The I-270 Corridor contains over 50 percent of the County's vacant residential zoning supply, with Germantown alone accounting for 27 percent of the total.

. The dwelling unit potential of vacant land with sewerage service

categories 1-3 (categories in which the owners may apply for a preliminary subdivision plan and/or a sewer service authorization) totals 94,000.

. Small lot zoning (R-90, R-60, R-40 and Townhouse densities) potential makes up 33 percent of the total dwelling unit supply in sewerage service categories 1-3. The share for garden apartments is 29 percent.

. Thirty percent of the small lot and garden apartment supply is in the non-euclidian "planned community" Zones which include TS (Town Sector), PD (Planned Development), PRC (Planned Retirement Community) and PN (Planned Neighborhood). When the capacity in the planned community zones is excluded, the majority of garden apartments and small lot capacity is located on parcels of less than 10 acres.

. Outside of the I-270 Corridor area, the only major concentration of garden apartment zoning is within the Fairland Policy Area.

The Demand Report represents an assessment of the previous growth forecasts of the Planning Board which now appear to require major reductions. An updated forecast is needed due to the changing economic picture, and to assist the Board of Education with projections of the school age population over the next fifteen years. These interim forecasts will be revised after the Washington Council of Governments completes the third round of the Cooperative Forecasting Process.

A novel feature of the interim forecast is that alternative scenarios of economic and social conditions are presented, assumptions underlying each scenario are documented as the data are presented. The Demographic Model may be used to test alternative scenarios and assumptions (i.e. changes in birth rates, mobility, housing completions, etc.) as requested by users.



# MONTGOMERY COUNTY, MARYLAND

COUNCIL HEARING ROOM • 100 MARYLAND AVENUE, ROCKVILLE, MARYLAND 20850 • 301 279-1231 TTY-301 279-1083

*The Council Agenda is subject to change any time after printing or during the Council meeting. Please contact the Council Office to obtain current information.*

Silver Spring Armory  
Friday, November 7, 1980

## AGENDA

### MONTGOMERY COUNTY COUNCIL MEETING WITH THE MONTGOMERY COUNTY PLANNING BOARD DISCUSSION OF LONG RANGE PLANNING ISSUES

9:30-10:45 A.M.

#### I. TRENDS

- Current and Long Range Trends in the County
- Implications

10:45 RECESS

11:00-12:30 P.M.

#### II. STATUS OF THE GENERAL PLAN

- General Overview
- Planning Mechanisms
- Identification of tools necessary to carry out the Plan
- Report concerning the implementation of these necessary tools

12:30-2:00 P.M. (Lunch)

2:00-3:15 P.M.

#### III. AGENDA FOR THE NEXT TWO YEARS

3:15 - RECESS

3:30-4:30 P.M.

#### IV. QUARTERLY MEETING



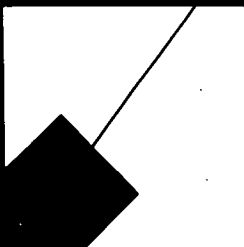


# GROWTH POLICY

Report

# LAND SUPPLY & DEMAND

November 1980



THE MARYLAND-NATIONAL CAPITAL  
PARK AND PLANNING COMMISSION  
MONTGOMERY COUNTY PLANNING BOARD  
8787 Georgia Avenue  
Silver Spring, Maryland 20907